

Repairline User Guide

Contents

Repairline User Guide	1
1. Repairline / How to Start/Set up	5
How you CAN start:	5
2. Info-Panel	8
3. Overview	9
4. New Servicecase	10
5. New Ticket	16
6. Loan Units	17
7. Search	18
8. My Account	19
8.1 Account-Information	19
8.2 Change Password	20
8.3 Personal Requisition Notes	21
8.4 Shoppingcart	21
8.5 Accounting details	22
8.6 Monthly costs	22
8.7 Costcalculator	23
8.7 Terminate Contract	23
9. Customer Admin	24
10. Administration	25
10.1 Company	25
10.2 User	27
10.3 PIN	27
10.4 DOA check	28
10.5 Email Template	30

10.6 Look and Feel	30
10.7 Know-How	31
10.8 Column selection	32
10.9 Accounting	33
10.10 Translation Mode	34
10.11 Forwarder	35
10.12 Service-Code	35
10.13 Workflow	36
10.14 Settings	43
10.15 Shop-Matrix	43
10.16 Shop – Users	44
10.17 Service Type	45
10.18 Status-Reason	45
10.19 Reason for Swap	46
10.20 Test Procedures	47
10.21 Texttemplate	47
10.22 Product	49
10.23 Partgroups	50
10.24 Parts	51
10.25 Import/Export	51
10.26 Number Ranges	52
10.27 Document Template	53
11. Documents	55
11.1 Documents to print	55
11.2 Document Archive	55

11 Stock	55
11.1 Incoming Goods	55
12.2 Fast Entry	56
12.3 Allocate Incoming Goods	57
12.4 Open Part Orders	58
12.5 Delivery Note	59
12.6 Manual Entry	60
12.7 Stock Requisition	60
12.8 Stock Posting	61
12.9 Stock Level	61
12.10 Stock Allocation	62
12.11 Stock Ground	63
13 Procurement	65
13.1 Intending Orders	65
13.2 Order Proposals	67
13.3 Open Requisition Notes	68
13.4 Requisition Notes	69
13.5 Part Order Book	70
13.6 Supplier	70

1. Repairline / How to Start/Set up

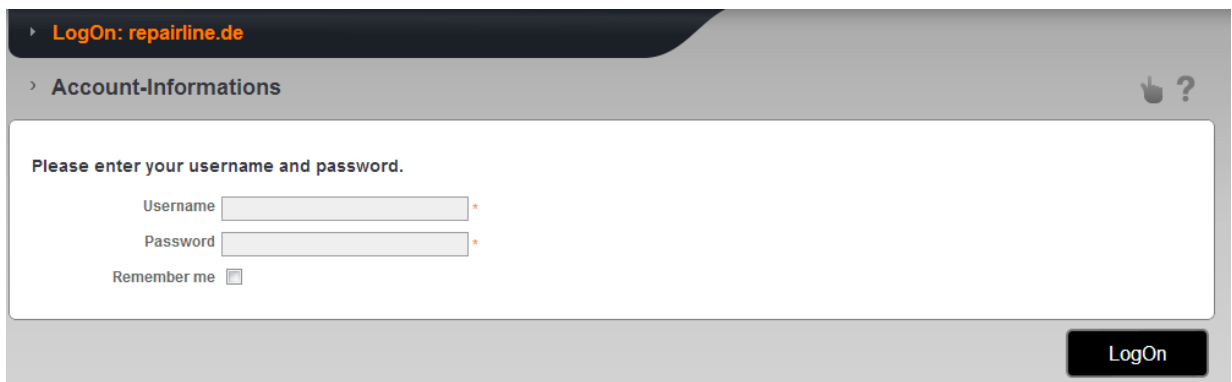
Keep track of your Service Cases

The extensive online tool for flexible handling of service and repair brings your workflow into line and repaired equipment back to the client as quickly as possible – for repair service provider, merchants and manufacturers.

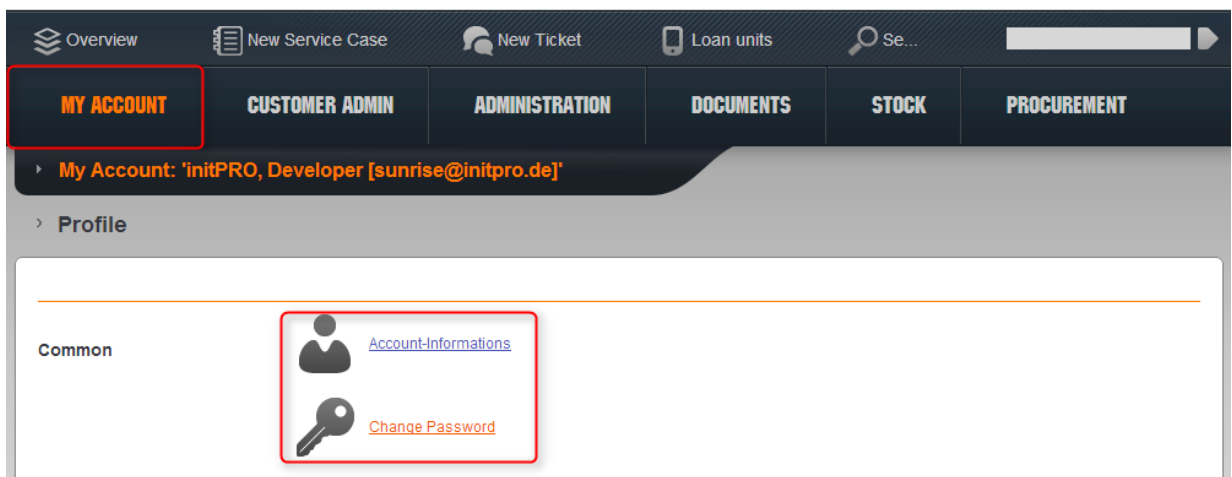
How you **CAN** start:

All steps will be explained in detail in the sections 2. - 13.6.

First of all you have to log on at system.repairline.de by entering your username and your password that you received from us. Register online: repairline.de/index.php/en/testing-en

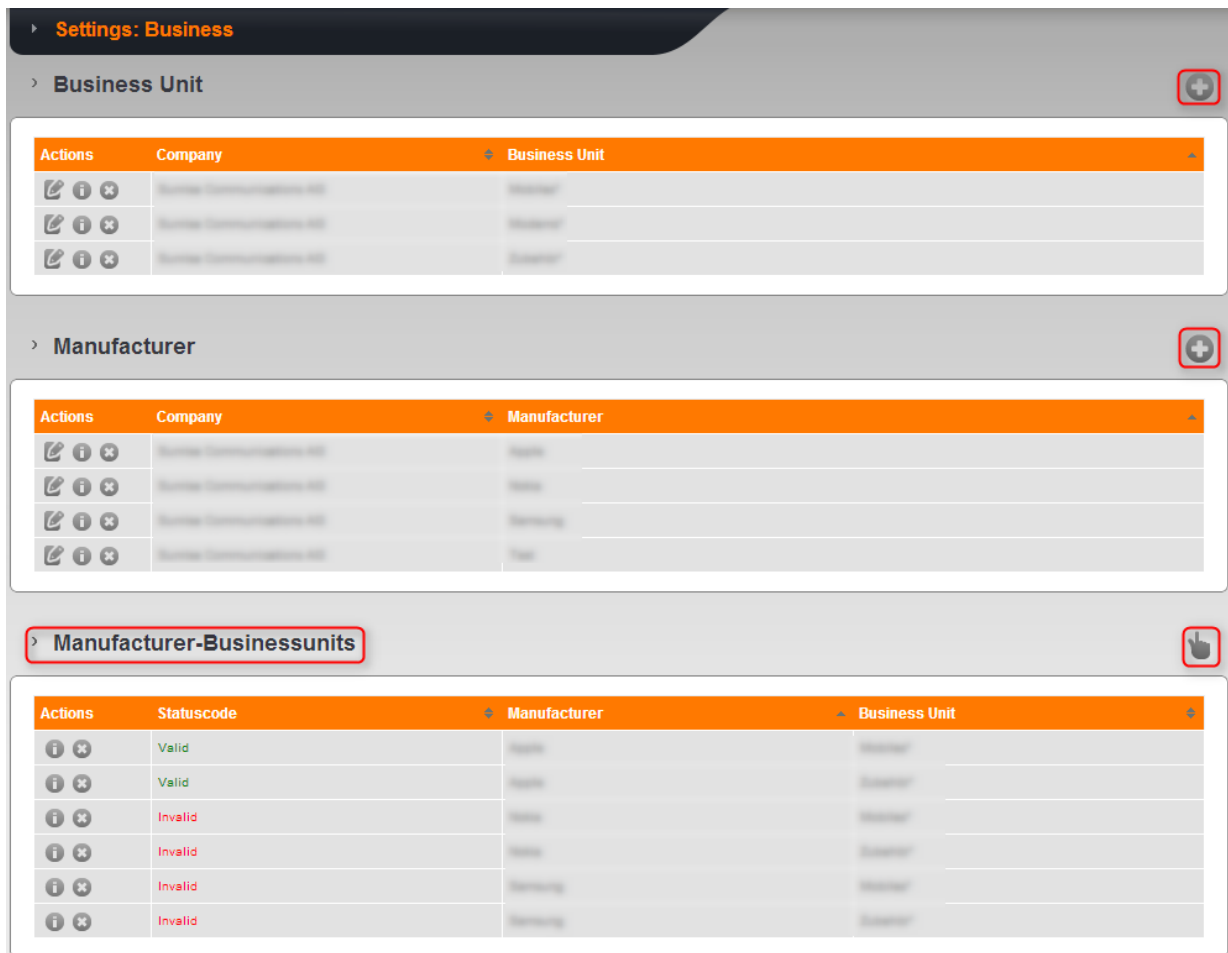


Now you can change the password by clicking on **“My Account”** – **“Change Password”** and right after that enter your company’s account-information’s by clicking on **“Account-Informationen”**.



(Described in detail in 8.1 and 8.2)

Now you should set up your Business Process configuration. For this you have to click on “**Administration – Business – Settings**”. Now create your Business Units by clicking on the “Add” icon on the right. After that create your Manufacturer’s by clicking on the other “Add” icon and set the Manufacturer-BusinessUnits relations. The Manufacturer-Businessunit list will be created automatically. You also assign the Workflows and Service-Codes to the Manufacturer-BusinessUnits.



The screenshot shows the 'Settings: Business' configuration page. It contains three main sections, each with a table and an 'Add' icon on the right.

Business Unit

Actions	Company	Business Unit
	Service Communication AG	Unit1
	Service Communication AG	Unit2
	Service Communication AG	Unit3

Manufacturer

Actions	Company	Manufacturer
	Service Communication AG	Man1
	Service Communication AG	Man2
	Service Communication AG	Man3
	Service Communication AG	Man4

Manufacturer-Businessunits

Actions	Statuscode	Manufacturer	Business Unit
	Valid	Man1	Unit1
	Valid	Man1	Unit2
	Invalid	Man1	Unit3
	Invalid	Man2	Unit1
	Invalid	Man3	Unit1
	Invalid	Man3	Unit2





(Described in detail in 10.13)

Up next is the Service-Code. To create Service-Codes click on “**Administration – Business – Service-Code**”. Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your one Service-Code! This allows you a manufacturer-independent service execution.




MY ACCOUNT
CUSTOMER ADMIN
ADMINISTRATION
DOCUMENTS
STOCK
PROCUREMENT

Index: Service-Code

System-Templates [4]

Actions	Code-Spezification	Code-Spezification-Description
	Handy-Code*	Codierung von Handy-Fehlersymptomen und -reparaturen*
	IRIS Code	IRIS Code
	Notebook Code	Notebook Code
	Simple Code	Symptom and action

Settings

Actions	Company	Code-Spezification	Code-Spezification-Description
	Service-Code-System-Code	IRIS Code	IRIS Code
	Service-Code-System-Code	Test	Test
	Service-Code-System-Code	Test	Test



(Described in detail in 10.11)

Now click on “**Administration – Business – Workflow**” to confirm your Workflows. The Workflow is the actual repair process that is performed the same or similar for repairs. You can use either one of the System-Templates and confirm them the way you want or you can even create your one Workflow!





MY ACCOUNT
CUSTOMER ADMIN
ADMINISTRATION
DOCUMENTS
STOCK
PROCUREMENT

Index: Workflow

System-Templates [2]

Actions	Textkey
	Werkstatt Reparatur*
	Initial

Settings

Actions	Company	Textkey	Statuscode	Copy from	Ordering
	Service-Code-System-Code	Standard*	Valid	no	
	Service-Code-System-Code	Initial	Valid	Initial	

(Described in detail in 10.12)

Now you should select your Service Types. The service type determines which repair services are offered to the customers. Click on “**Administration – Business – Service Type**”. And

again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

Index: Service Type

System-Templates [17]

Actions	Servicetype-Key	Textkey
	BI	Bring in
	CBR	Central board repair
	DOA	DOA
	ESC	Escalation
	EX	Exchange
	HS	Home service
	P	Pickup
	PUR	Pickup+Return
	PEX	Preexchange
	PP	Premium pickup
		Premium service
	RE	Refund
	RET	Return
	RMA	RMA
	S	Shuttle
	SWAP	Swap
	TD	Transportation damage

Settings

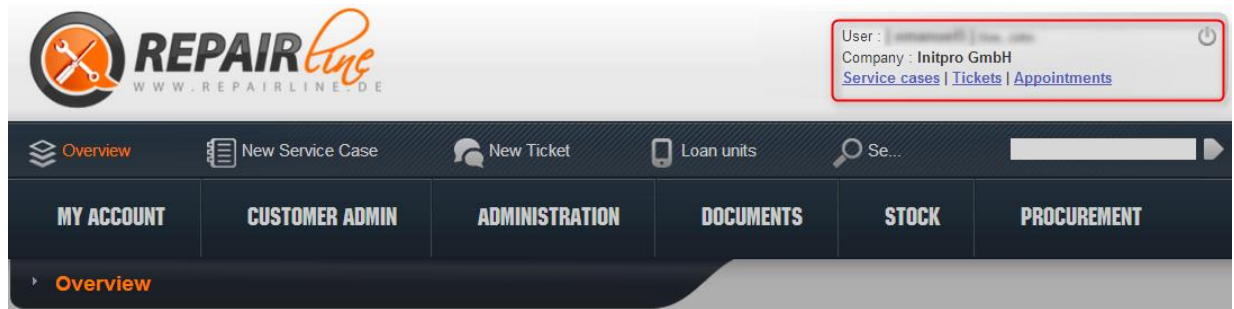
Actions	Company	Servicetype-Key	Textkey
	Service Communication AG	BI	Bring in

(Described in detail in 10.15)

Now you have the minimal together to create a Servicecase.

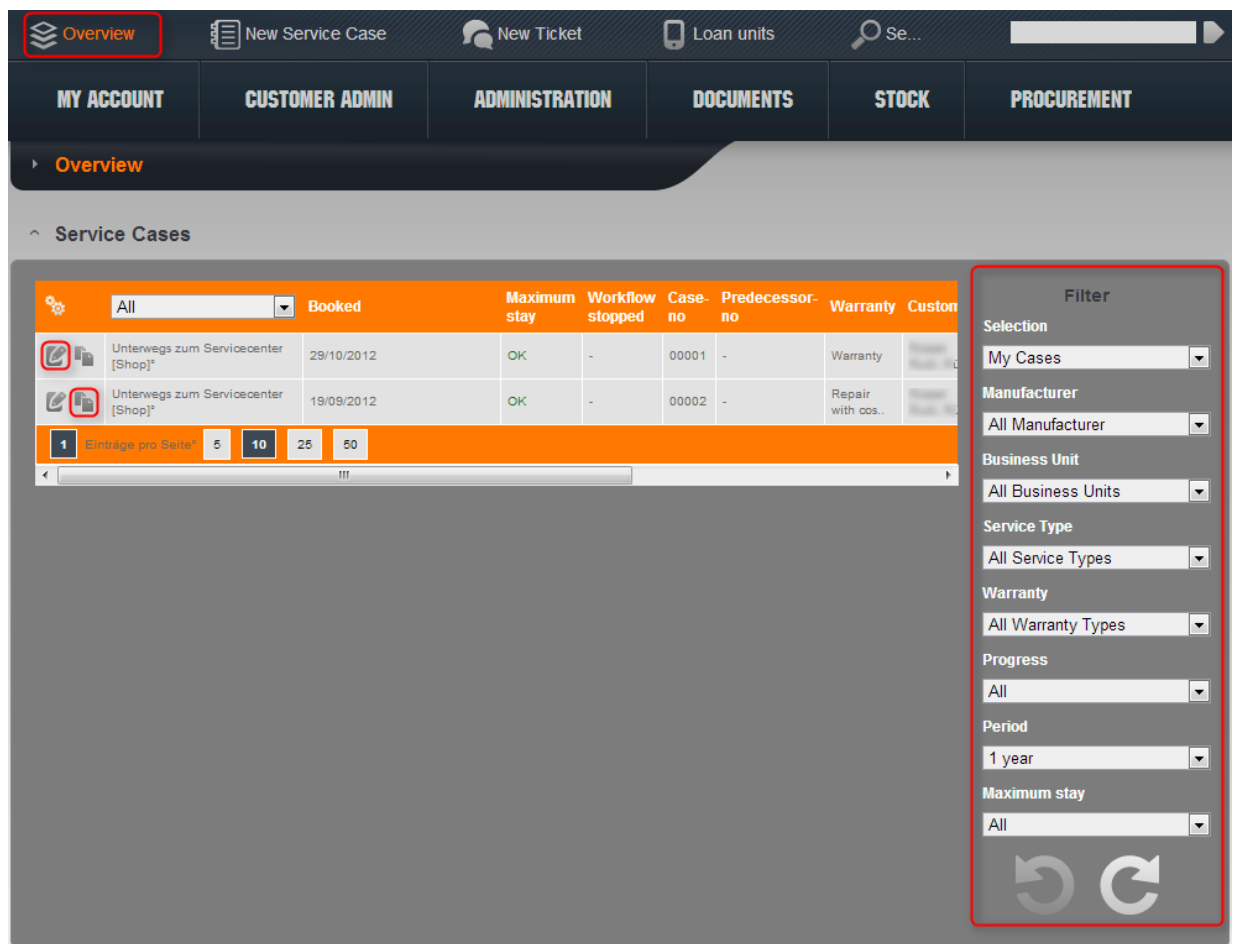
2. Info-Panel

The Info panel shows you under which user / company you are logged in. You also be quickly accessed via the Info panel to all the information about your service cases, tickets and client meetings. By clicking on service cases, tickets or client appointments appear a detailed overview. In the information panel is at the top right a "Logout" icon, click on this icon to log out.



3. Overview

Under the menu item "**Overview**" you can get a quick and easy overview of your Servicecases, tickets and customer meetings. Set the filters as desired and click the "Apply" icon (the icon on the right). Now the desired Servicecases / Tickets / Customer Meetings will be shown and can be edited by clicking on the "Edit" icon. If there is a Servicecase that is similar (for example same Manufacturer – Businessunit and Costumer) to a new Servicecase you can create a new Servicecase "Clone" that will save you time. To reset the filter's settings, click the "Reset" icon (the icon on the left).

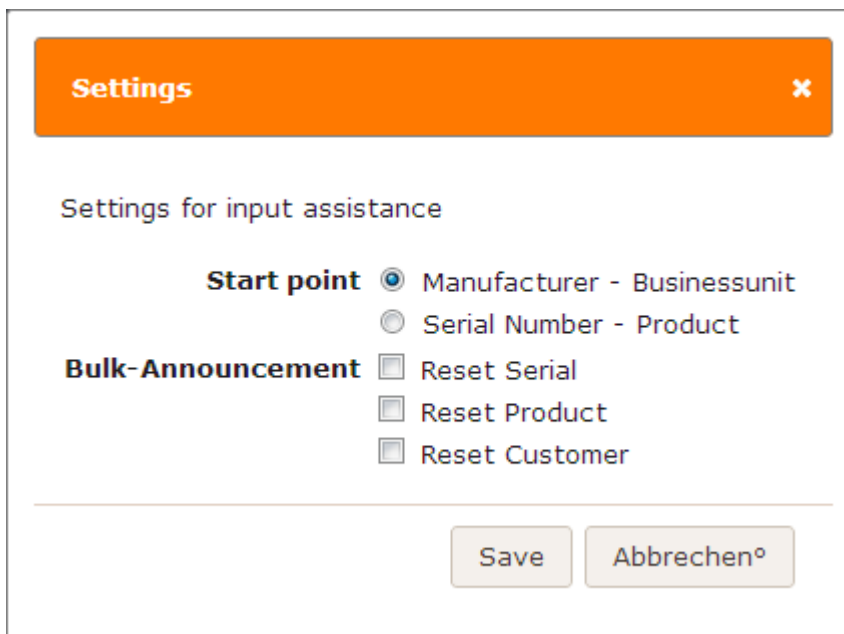


4. New Servicecase

To add a new service you have to click on "New Service Case".


By using the Servicecase-Input-Assistant, you can enter all the relevant details of a repair order in only few steps. The Input-Assistant can be configured according to your wishes. This allows for example a rapid mass capture of Servicecases.

Click on the "Settings" icon (on the right top) to set the current settings of the Input-Assistant. You can select the start point of the Input-Assistant and confirm the Bulk-Announcement by setting a check mark to the chosen section. This section will be reset for each new Servicecase.



The screenshot shows a 'Settings' dialog box with an orange header bar containing the title 'Settings' and a close button (X). Below the header, the text 'Settings for input assistance' is displayed. The dialog contains two main sections: 'Start point' and 'Bulk-Announcement'. Under 'Start point', there are two radio buttons: 'Manufacturer - Businessunit' (which is selected) and 'Serial Number - Product'. Under 'Bulk-Announcement', there are three checkboxes: 'Reset Serial', 'Reset Product', and 'Reset Customer', all of which are currently unchecked. At the bottom of the dialog, there are two buttons: 'Save' and 'Abbrechen°'.

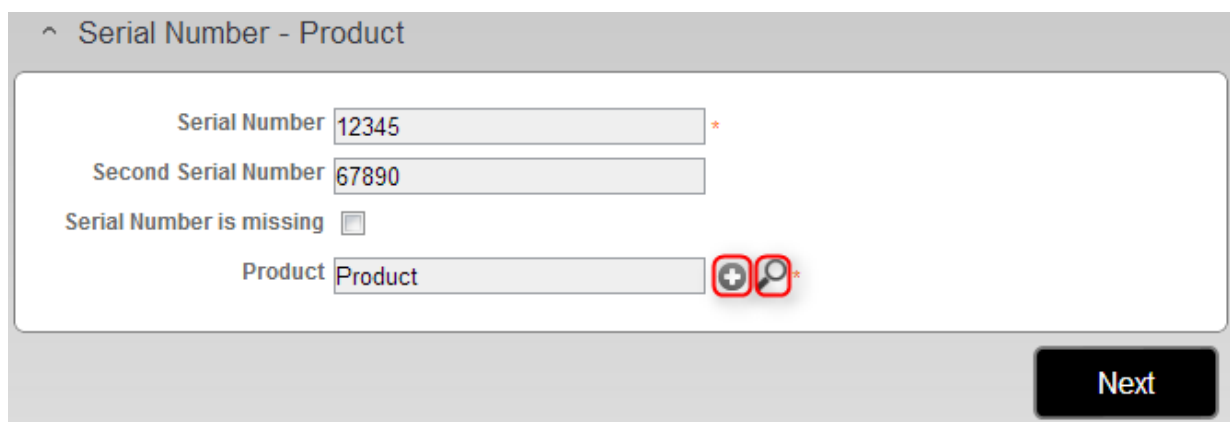
You have the option to write a comment to each Servicecase and select settings (such as Data Backup, Recustomize, Customer Survey, Reference) and see the Previous Repairs.



The screenshot shows the 'New Case' form. At the top, there is a tab labeled 'New Case: > Bulk import: [Excel]'. Below this, the 'Manufacturer - Businessunit' section is active, showing dropdown menus for 'Manufacturer' (with 'Porsche' selected) and 'Business Unit' (with 'Zubehör°' selected). A 'Next' button is visible to the right of these dropdowns. Below the 'Manufacturer - Businessunit' section, there are three expandable sections: 'Serial Number - Product', 'DOA check', and 'Customer'. On the right side of the form, there are several options: a 'Comment' button, a 'Settings' button (both highlighted with red boxes), a 'Data Backup' checkbox, a 'Recustomize' checkbox, a 'Customer Survey' checkbox, a 'Reference' text input field, a 'Previous Repairs' button (highlighted with a red box), and a 'No Entry' button. A gear icon (Settings) is also visible in the top right corner of the form area.

The entry of the Servicecase:

At first select the Manufacturer and the Business Unit of the device and click on “Next”. Enter (if available) the serial number (and the second serial number) of the product that has to be edit. If the serial number is not available place a checkmark next to “Serial Number is missing” (either the serial number must be given or serial number is missing must be set). Now enter the name of the product (mandatory item). In order to receive a product from your product list, click on the “Loupe” and select the desired product by clicking on it. If the wanted product is not listed in your product list, you have the option of creating the product while you are recording the Servicecase. For that you have to click on the “Add” icon. If you have selected the Serial Number and the Product click on “Next”.



Specify the Service Type for this repair and click on “Next”.

Enter the customer's name in the search bar. If the customer is already known the name and address of the customer will appear. Click on the displayed customer. If the customer is not registered as a customer yet, click on the “Add” icon to create the new customer. After the customer has been selected the customer information's will be shown. Now you can select Contact, Invoice Address and Delivery Address. If the information's of costumers are not up-to-date you can update them by clicking on the “Edit” icon. When all of the information's are correct then click on “Next”.

^ Customer

Search +*

Customer data

Customernumber 00002

Reference

Title

Firstname Max

Lastname Mustermann

Companyname Musterfirma

Email muster-email@initpro.de

Phone mobile 0123456789

Languagesetting Deutsch

Customer contact Sms

Contact +

Invoice Address +

Delivery Address +

Next

Select the Warranty Type (for example warranty or repair with costs) and enter the date of purchase and the expiration date. If the correctness of the accounts and warranty could be checked, please put a check mark for confirmation. You also have the option of adding facilities (for example till receipt). Click on “Next”.

^ Warranty

Purchase date

Expiration date

Warranty type +

Accounting type +

Max. Repair CHF *

☒ Purchase and warranty checked

Add Attachments Keine ausgewählt



Next

The DOA-check will set the Servicecase as DOA-check passed or rejected. If the statement of the DOA-check that is true set a checkmark and the next statement of the DOA-check will appear. If a statement is not true, click on “Next” and the Servicecase will be set as DAO-check rejected. If all the statements of the DOA-check are true and all checkmarks has been set click on “Next” and the Servicecase will be set as DOA-check passed.

^ DOA check

☒ DOA meets deadline according to the date of purchase. Perform testing to DOA?
☒ Packaging and complete?
☒ Goes back longer than 5 days of sale/delivery at delivery@home?
☒ Impeccable condition of the device (no scratches, no mechanical damage)?
☒ Impeccable condition in the original packaging (no damage, no additional be
schriften or sticker)?
☒ Is the IMEI number on the appliance and the packaging the same?

Next

^ DOA check



☒ DOA meets deadline according to the date of purchase. Perform testing to DOA?
☒ Packaging and complete?
☒ Goes back longer than 5 days of sale/delivery at delivery@home?
☒ Impeccable condition of the device (no scratches, no mechanical damage)?
☒ Impeccable condition in the original packaging (no damage, no additional be
schriften or sticker)?
☒ Is the IMEI number on the appliance and the packaging the same?

DOA check passed

Now define the failure symptoms. By entering the symptom in the search line and the symptom are known the symptom and action will be set automatically. To add an additional symptom you have to click on the “Plus” icon next to Add. Symptoms. In order to achieve a more detailed error description, add a detailed symptom description / Comment in your own words to describe the symptoms.

^ Failure symptom

Symptomauswahl°

^ Symptom ↻

[01] Defect

^ Action ↻

[01] Repair

Add. Symptom

Detailed symptom description / Comment

Next

Select Workflow and entry point and click on “Next”.

^ Repairline workflow

Workflow

Standard°

Workflow-Step-Id

Order created

Next

On the adoption of the device supplied accessories can be optionally registered. Set a checkmark to each accessories that is delivered. If every accessories are sent along put a checkmark next to Name and all accessories will be selected.

^ Accessories

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Battery
<input checked="" type="checkbox"/>	casing
<input checked="" type="checkbox"/>	Charger
<input checked="" type="checkbox"/>	data cable
<input checked="" type="checkbox"/>	Headset
<input checked="" type="checkbox"/>	memory card
<input checked="" type="checkbox"/>	original packaged and complete
<input checked="" type="checkbox"/>	SIM Reader
<input checked="" type="checkbox"/>	warranty paper

Next

To forward a service case to colleague, select from the drop-down list "user" the desired colleagues.

To create a customer appointment, enter your appointment details.

Appointment

Appointment *

Reminder (min.) *

Subject *

Status *

User *

Location: *

Content

Quellcode **B** *I* |

Stil ▼ | Format ▼ | Schriftart ▼ | G... ▼

A ▼ A ▼

body < >

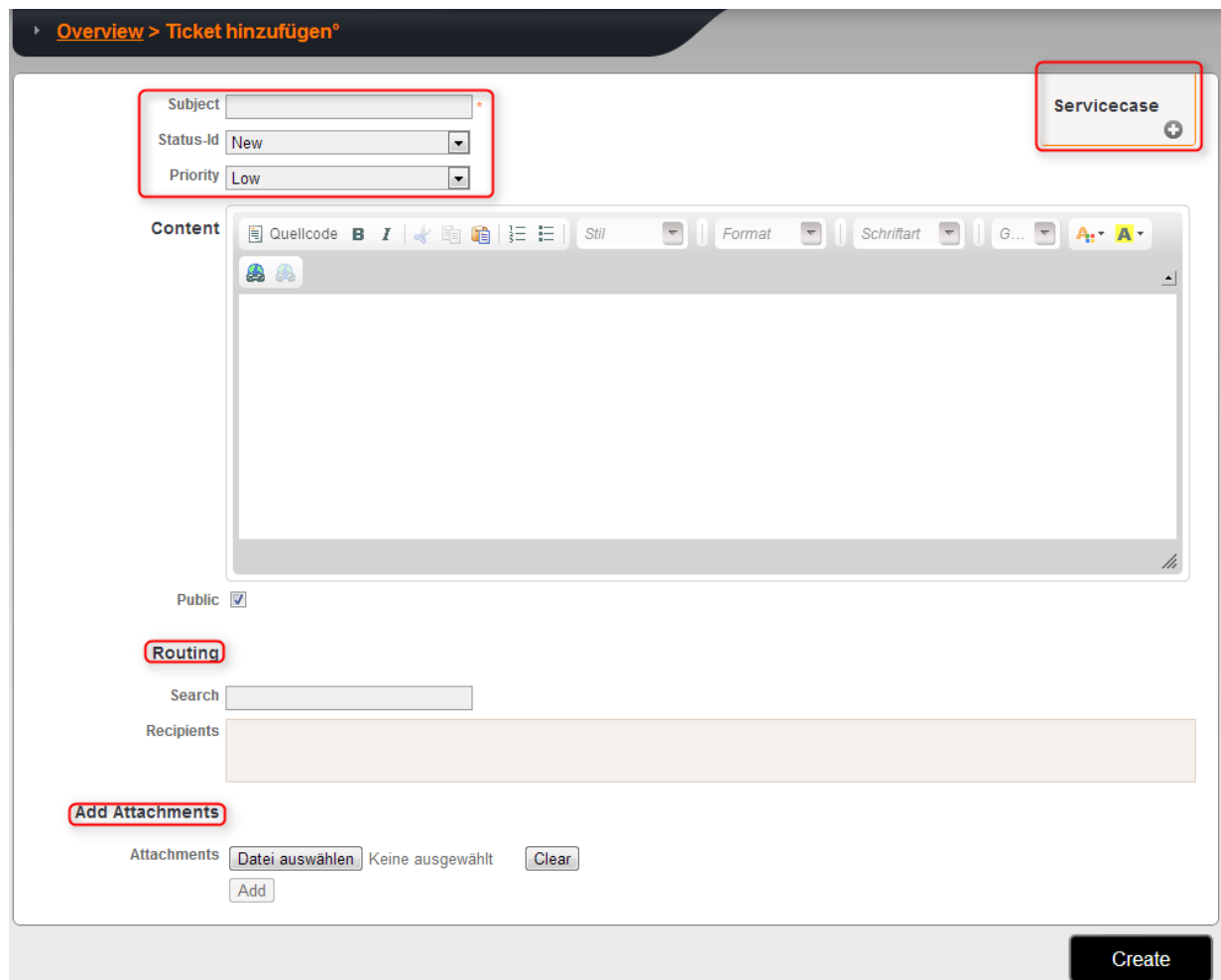
Public ☐

Click on "Create" to complete the servicing acquisition.

5. New Ticket

The ticket system manages your service requests. Each process is given a unique number so that the inquiries will be forwarded to the responsible contact person and can be processed as quickly as possible. To create a Ticket enter the subject, the status no. and select the priority. Enter your text in the text box and enter the names of your colleagues who will receive the ticket in the search line. It is possible to add the ticket attachments there for select a file and click on the “Add” icon. The Ticket can also be assigned to a Servicecase. For that you have to

click on the “Add” icon on the top right and select the Servicecase. To complete, click on “Create”.



Overview > Ticket hinzufügen°

Subject

Status-Id

Priority

Servicecase

Content

Public ☒

Routing

Search

Recipients

Add Attachments

Attachments Keine ausgewählt

6. Loan Units

Here you see all your loan units. To add a loan unit click on the “Plus” icon. Enter the name and the Serial Number of the product and select the owner of the product. Click on the “Crte” icon to conclude or click on the “Crete + New” icon to save the loan unit and add another loan unit. The Index gives you an overview of all loan units and shows you if the product is lented or not. By clicking on the “Actions” icons you can edit, delete or look at the information’s of the product. All lent products are listed under lented loan units if a lent product returns click on the “Return” icon to delete the product from the lented loan units list. To find a product quickly enter the serial number in the search line on top.

Search

Search for

Filter: -

User

☐ Manufacturer

☐ Business Unit

☐ Service Type

☐ Progress

☐ Nächsten Schritt buchen*

☐ Product

☐ Period

Date from 14/12/2012
 Date to 14/12/2012

☐ User

☐ Warranty

Enhanced warranty

☐ Customer

☐ Reference

☐ Maximum stay

OK

Search Result [57]

	All	Booked	Maximum stay	Workflow stopped	Case-no	Predecessor-no	Warranty	Customer	Serial Number	Product	Manufacturer	Business Unit	Service Type	Agent
	Repair*	05/05/2011	OK	Stopped										
	Repair*	29/03/2011	OK	-										
	RepairFinished*	04/04/2011	OK	-										

8. My Account

8.1 Account-Information

Under "**My Account - User Information**" you can manage your own contact details and specify in which language you want to use Repair Line. It also appears your assigned role.

Account-Informationen

User

Title

Firstname

Lastname

Department

Phone

Phone mobile 012345

Fax 012345

Email

street

Additional

Zip-Code 120012

City City

State State

Sign

Decline Mail-Notification

Current settings

Language setting English

Login valid until 31/12/2049 01:00

Assigned Roles

- Administration [Administrator]
- Host [Host]
- Technician [Technician]

Save

8.2 Change Password


To change your password, click on **"My Account - Change Password"**. Enter your current password and your new password. The password must be at least 6 characters. Confirm your new password by entering it again. For each password change a Captcha security feature is performed. Finally, click on "Change Password".

If you ever lose your password you have to click on the "Request Password" icon at the main page. Then they will need to enter your Shop-Email address and enter for the security check the given Captcha-String.

▶ **LogOn: Request password**

Shop-Email

▶ **Security Check**

Captcha 

Captcha-String *

Requesting


8.3 Personal Requisition Notes


Here appear all of your common and servicecaserelated requisitions that you have created. By clicking the "Add" sign you can create new common requisitions.

▶ **Index: 'Personal Requisition Notes'**

^ **Servicecaserelated [0]**

No entries found

^ **Common [1]** 

Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	initPRO, Developer [sunrise@initpro.de]	<u>0123456 - Example</u>	12	no	10/12/2012 01.25	01/01/2013	0	0	0	0	12

8.4 Shoppingcart


Here you can create new requisition by using a shopping cart. Enter in the search field the part name (or part number, UPC code) and select the quantity and click on the "Select" icon. Now an information box will appears on the right top. To proceed, click on "Shoppingcart" select the requested delivery date and to complete click on "Create Requisition Notes".

▶ **Shoppingcart: Parts**

Shoppingcart

Search for Partnumber, Partname, EAN-Code

▶ **Result**

Select	Partnumber	Partname	EAN-Code	Partdescription	Quantity
	0123456	Example			1 <input type="text"/>

Shoppingcart > Requisition Notes

Shoppingcart

Actions	Parts	Available	Requested Deliverydate	Quantity
✕ ↺	0123456 - Example	0	01/01/2013	1

Create Requisition Notes

8.5 Accounting details

Under "**Accounting details**" you set the address to which the billing details will be sent. Please choose the invoice type (printed or email) and the payment method (for example Direct Debit or Paypal). If you choose the Direct Debit pay method you have to enter your account data's.

8.6 Monthly costs

Have a look at our well-structured price list:

Monthly costs consist of the number of registered users and the summed up monthly service cases. The following scale creates absolute transparency of costs:

Base Rate

User	1 - 10	11 - 50	51 - 100	101 - 500	501 -
Service Cases incl.	10	40	80	165	500
Price* per month	10 €	30 €	60 €	120 €	350 €

Costs per Registered Service Case

Service Cases per month	1** - 50	51** - 200	201** - 500	501** - 1000	1001** - 10000	10001** - 50000	50001** -
Price* per Service Case	0,70 €	0,65 €	0,60 €	0,55 €	0,50 €	0,40 €	0,30 €

* all prices are quoted before value added tax.

** as from the 1st service case; as from the 51st service case; as from the 201st service etc.

"**My Account - Monthly costs**" here you can see the costs overview of your company. Use the filters to choose over which period you want to see the cost overview.

Index: Cost overview

Month / Year	Monthly basicrate	User count	Included cases	Case count	Charged cases	Avg Costs per case	Monthly costs	Last update	Payed	Actions
12 / 2012										
	Details			Case count		Average costs per case €	Sum €			
						Included cases				

8.7 Costcalculator

By using the Costcalculator you can calculate the monthly cost of your company. By entering the number of users and the number of Servicecases the Cost Calculator creates you the monthly costs that would be incurred. To calculate the monthly costs you have to enter the user count and the case count.

Started: Costcalculator

User count *

Case count *

Calculate

Monthly costs

Sum

Included cases 10

Charged cases 40

Monthly basicrate 10.00 €

Avg Costs per case 0.70 €

Monthly costs 38.00 €

Details

Case count	Average costs per case €	Sum €
1-40	0.70	28.00
41-50	Included cases	0.00

8.7 Terminate Contract

To terminate your contract, click on "**My Account - Terminate Contract**". Now select the termination month and put a check mark to "Terminate Contract" (In the text field "Comment" you can make comments to your termination / for example the reason for the termination). To complete the termination, click on "Submit".

Terminate Contract: 'Sunrise Communications AG'

Your Contract can be terminated here

Cancel month 12 / 2012

Comment

☒ Terminate Contract *

Submit

9. Customer Admin

Customer may be created when recording a new Servicecase. Already registered customers can be searched under "**Customer Admin**". The search is performed by typing the first or last name (search also accepts Customernumber, Email, Companyname, Additional, Street, Zip-Code, City, Reference) or by using the alphabetical index. The search is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @letter all registered customers will be listed.

The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the "Edit" icon the data's of the costumer can be changed. Under "Detail" the costumer information's and the last ten Servicecases will appear. By clicking on the "Delete" icon the costumer will be delete.







MY ACCOUNT
CUSTOMER ADMIN
ADMINISTRATION
DOCUMENTS
STOCK
PROCUREMENT

Index: '@'

Search for
Reference, Lastname, Firstname, Customernumber, Email, Companyname, Additional, Street, Zip-Code, City

@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Customer

Actions	Customernumber	Lastname	Firstname	Title	Companyname	Address
  	00001					
  	00002	Mustermann	Max		Musterfirma	Musterstraße 1 1234 Musterstadt

To create a new costumer you have to click on the "Add" icon. After clicking on the "Add" icon a formula will appear. Now select the customertype, the customer's language and the way the customer is contacted. Enter the information's of the costumer and click on create.

Customer > Create: Customer data

Customer

Customertype: Repaircenter
Is editable in wizard: ☒ *

Customers language: English *

Customer contact: ☐ SMS ☐ Email

Companyname:
Salutation: ☐ Mrs ☐ Mr
Firstname:
Lastname:
Email:
Phone:
Mobile phone:

Department:
Street: *
Additional:
Zip-Code: *
City: *
Country: SWITZERLAND *

Create

10. Administration

10.1 Company


"**Administration - Company**" here you find your Company's master data set. You can see the details of your company (such as address, telephone number, time zone, currency, VAT rate,%, etc.) which can be changed any time by clicking on the "Edit" icon.

MY ACCOUNT CUSTOMER ADMIN **ADMINISTRATION** DOCUMENTS STOCK PROCUREMENT

Details: Company 'Business Communications AG'


Business Communications AG

Companytype: Business Provider
Company: Business Communications AG
Departement:
Street: Business Communications AG
Zip-Code: 8000
City: Zurich
State:
Country: SWITZERLAND
Timezone: (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
Phone: +41 58 777 66 26
Fax:
Email: business@business.ch
Url:
VAT Reg.-No.:
VAT %: 8.00
Currency: CHF
Timeunit-Id: Minutes




Here you will also find an overview of User. The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the "Edit" icon the data's of the user can be changed. Under "Detail" you will see the details to that user and you will see the Assigned Roles. By clicking on the "Delete" icon the user will be delete.


Here you also set Current-Settings, Warehouse-Settings and Working hours of your company. By clicking on the "Edit" icon these settings can be changed.

^ **Current settings**


Is partgroup required **no**

^ **Warehouse-Settings**


Use warehouse **yes**
Use Incoming/Outgoing- **no**
Goods
Use consignment storage **no**
Use bonded storage **no**

^ **Working hours**


Is login-validation required **yes**

Weekday	Start	Finishing time
Monday	05:00	20:00
Tuesday	05:00	20:00
Wednesday	05:00	20:00
Thursday	05:00	20:00
Friday	05:00	20:00

Edit the languages that your company accepts by setting a checkmark next to the language and decide which language is the default language.

> **Company > Edit: Language**

Language	Is in use	Is default
 Deutsch	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
 English	<input checked="" type="checkbox"/>	<input type="radio"/>
 Español	<input type="checkbox"/>	<input type="radio"/>
 Français	<input checked="" type="checkbox"/>	<input type="radio"/>
 Italiano	<input checked="" type="checkbox"/>	<input type="radio"/>
 中文的	<input type="checkbox"/>	<input type="radio"/>
 日本の	<input type="checkbox"/>	<input type="radio"/>

Save

10.2 User

To add a user, click the "Add" icon and enter the necessary user information. With each new registration a security check is performed and entering the Captcha string is required. To complete the registration click on "Register".

The registration form is titled "Create new Account: Register". It is divided into two main sections: "Account-Information" and "Security Check".

Account-Information

- Shop-Email: *
- Firstname:
- Lastname: *

Security Check

- Captcha:
- Captcha-String: *

A "Register" button is located at the bottom right of the form.

Existing users can be searched under "**Administration - Users**". The search is performed by typing the first or last name, or by using the alphabetical index. The search is done by clicking on the letter corresponding to the first letter of the surname. By clicking on the @ letter all registered users will be listed.

10.3 PIN

PIN is used to set the creator. It is needed when a Servicecase is captured or passed to a colleague.

The form is titled "Creator" and contains the following fields:

- Firstname
- Lastname Testperson
- Additional info
- Entry clerk 868





















At the top right of the form, there are two icons: a pencil icon for editing and a checkmark icon for saving.

Already registered PIN's can be searched under "**Administration - PIN**". The search is performed by typing in the first or last name into the search line. To edit or delete a PIN click on the icons in the action column.

Index: PIN

Suche

Index

Aktionen	Vorname	Nachname	Zusatz	Erfasser
 	Test	Testing		815
 				821
 				827
 				828
 				829
 				830
 				831
 				832
 				833
 				834

1 2 3 4 5 6 7 8 9 10 214 215

To create a new PIN you have to click on the "Add" icon the top right. Now enter First- and Lastname and the Entry clerk. You have the opinion to add Additional Informations.

To complete, click on "Create" or click on "Create + New" to create that PIN and stay on this page to create another one.

PIN > Create: PIN

Firstname *

Lastname *

Additional info

Entry clerk *

Create + New

Create

10.4 DOA check

Create under "Administration – DOA check" your individual Dead On Arrival-checks. The DOA-check is a check that is performed when a customer receives a product which does not work. The DOA-check is performed while a new Servicecase is created. If the product passes the DOA-Check the Servicecase will get a "DOA-check passed" status. Click on the "Add" icon to create a textkeys. After that they will be shown in the DOA-Check-Index. Set the ordering of the textkeys by clicking on the "Up" and "Down" icons. To edit or delete a textkey form the DOA-Check click on the icons in the action column.

Index: DOA check

Index

Actions	Textkey	Ordering
	DOA meets deadline according to the date of purchase. Perform testing to DOA?	
	Packaging and complete?	
	Goes back longer than 5 days of sale/delivery at delivery@home?	
	Impeccable condition of the device (no scratches, no mechanical damage)?	
	Impeccable condition in the original packaging (no damage, no additional be schriftungen or sticker)?	
	Is the IMEI number on the appliance and the packaging the same?	

If the first statement of the DOA-check is true set a checkmark. The next DOA-check statement will appear. When all statements of the DOA-check are correct “DOA check passed” will appear.

DOA check

☒ DOA meets deadline according to the date of purchase. Perform testing to DOA?

☒ Packaging and complete?

☒ Goes back longer than 5 days of sale/delivery at delivery@home?

☒ Impeccable condition of the device (no scratches, no mechanical damage)?

☒ Impeccable condition in the original packaging (no damage, no additional be schriftungen or sticker)?

☒ Is the IMEI number on the appliance and the packaging the same?

DOA check passed

Edit: Servicecase '0000008'

Workflow [Yes, please provide me with packaging.]

Device delivered to Service Center

Times

Internal comment on behalf of [-]

Loan units

Times

Order number

Order 0000008

Send @ Home yes

Customer Test Muster

Mobile 1111111

Manufacturer

Product group Tablet PC

Workflow Standard*

Warranty Warranty check

Accounting-Type No repair maximum amount

DOA yes

DOA rejected no

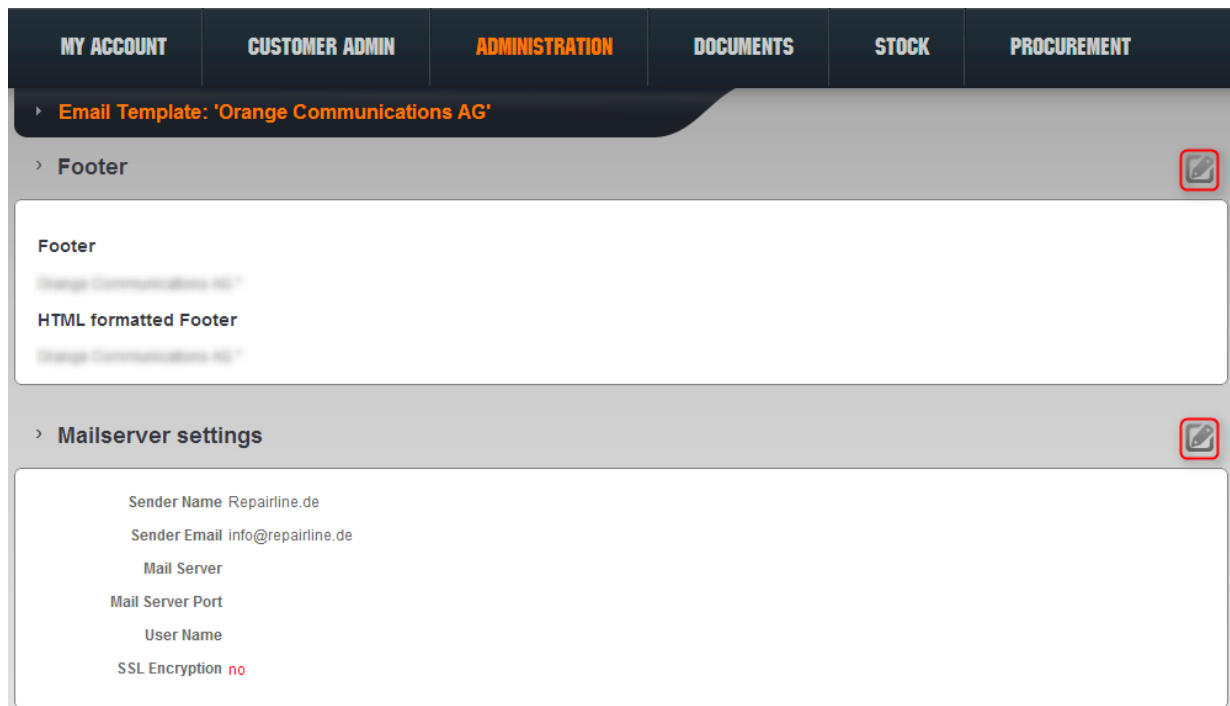
Customer tracking Edit

Produktdaten°

Kosten°

10.5 Email Template

Email - Templates allow the user to save time and easy to send emails. "Administration - email templates" may footer and general settings, such as the sender's name, sender email, mail servers, etc., the personal ideas can be adapted. To change the Footer or the Mailserver settings click on the "Edit" icon.




Please enter in your settings if you want use your own mail server, otherwise the default Repairline Mail Server setup is valid.

10.6 Look and Feel


"**Administration – Look and Feel**" here you can make individual adjustments to the website design. Color scheme, the image of the header and the footer are ready to complete as desired. To change the Look click on the "Edit" icon next to Theme, Header Image, Footer Image, Footer Address, Footer Contact or Contact email on login page. To reset the changes click on the "Reset" icon. All changes require a page reload!


▶ Look and Feel: 'Orange Communications AG'


Changes require a page reload!


▶ Theme
 


Theme Repairline*

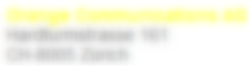
▶ Header Image
 



▶ Footer Image
 



▶ Footer Address
 



10.7 Know-How

Here under “**Administration – Know-How**” users, manufacturers and companies can share their know-how (general information or product-related information) and thereby optimize the quality of service. To create a general Know-How Message you have to click on the “Add” icon next to general informations. To create a product-related Know-How Message you have to click on the “Add” icon next to product-related informations.

Know-How > Enter new Know-How entry


Subject

Quelle*

Manufacturer - Businessunit

Content

Quellcode
 B
I
 [List Icons]
 Stil
 Format
 Schriftart
 G...
 [Color Picker]
 [Font Size]



Public ☒

Add Attachments

Attachments

 Keine ausgewählt

10.8 Column selection

Under “**Administration – Column selection**” you can select which columns you want to be displayed.

Each column shows different information's. Set a checkmark to each column you want to be displayed. To deselect a column, click on the set checkmark and the checkmark will be unselect.

Edit > Column selection

Spalten selektieren die angezeigt werden sollen.°

☒ Status
☒ Escalation level
☒ Booked
☒ Workflow stopped
☒ Order
☒ Predecessor no
☒ Warranty
☒ Customer
☒ IMEI/Serial no.
☒ Product
☒ Manufacturer
☒ Product group
☒ Service Type
☒ Agent

Save

10.9 Accounting

"**Administration - Accounting**" here you have the possibility to create Service-flat-charges and Wage groups of your users. To create a Service-flat-charge or a Wage group, click on the little "Add" icon next to each title. Now you only have to enter your text keys and the corresponding net price. When you type in the net price or the gross price the other one will be set automatically. (To edit the value added tax for your company click on **10.1**

"Administration Company") To complete, click on "Create" or click on "Create + New" to create that Service-flat-charge/Wagegroup and stay on this page to create another one.




Index: Forwarder

Index

Actions	Forwarderkey	Forwarder name	Forwarder
  	UPS	UPS	Default

Index: Accounting AG

Service-flat-charge

Actions	Service-flat-charge-Key	Textkey	Price net	Price (gross)
  	AK	Austauschkosten*	222.22 CHF	240.00 CHF
  	R	Rabatt*	22.22 CHF	24.00 CHF
  	RK	Reparaturkosten*	222.22 CHF	240.00 CHF
  	Z	Zusatzkosten*	35.00 CHF	37.80 CHF

Wagegroups

Actions	Textkey	Price net	Price (gross)
  	Standard*	0.00 CHF	0.00 CHF

Accounting > Edit: Service-flat-charge

Service-flat-charge

Service-flat-charge-Key
Textkey


Translated name required

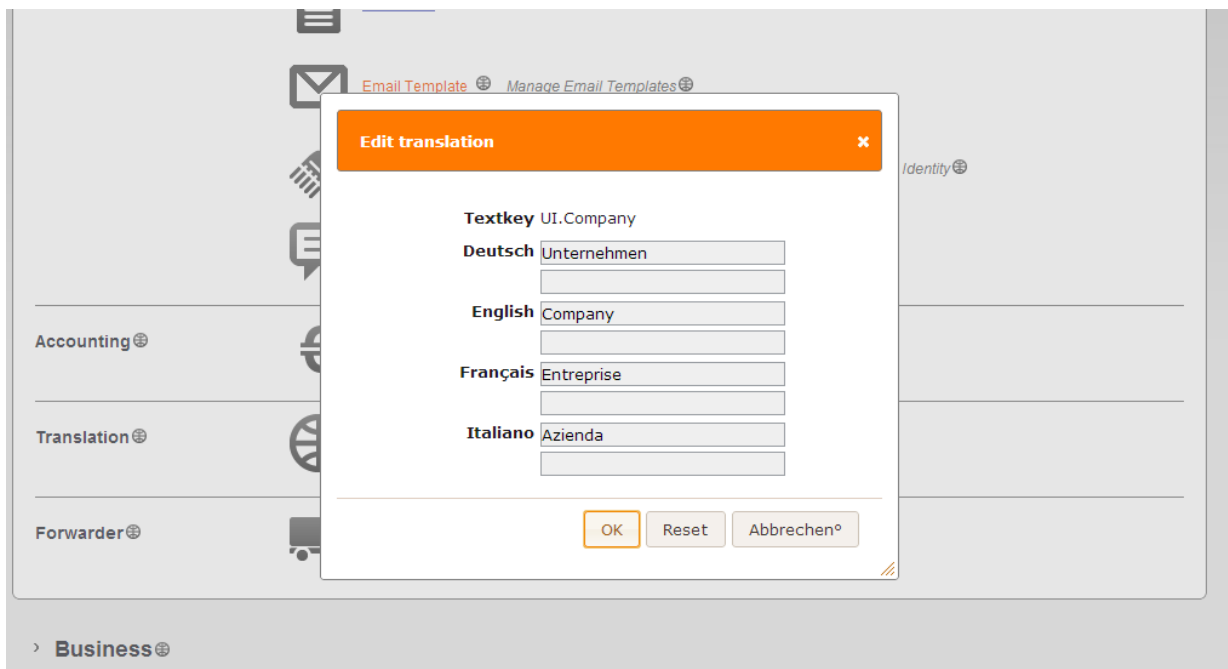
Price net CHF *
 Price (gross) CHF

Create + New

Create

10.10 Translation Mode

To turn the translation mode on or off, click on "**Administration - Translation Mode**". Is the translation mode is on, after each key text appears this icon:  By clicking this icon opens a window for editing the text key. Now you can edit the translation of the text key in the languages that you have chosen for your company.



10.11 Forwarder

To be able to send packets to orders to shipping company (UPS, DHL) will be taught .Click here to update your master data record for carrier / parcel service. To create a new carrier you have to click on the "Add" icon the top right. Now enter the data for your carrier to (Forwarder name and Forwarder type are required) and to complete click on "Create" or click on "Create + New" to add another carrier.



Actions	Forwarderkey	Forwarder name	Forwarder
 	UPS	UPS	Default

10.12 Service-Code

To create a service code, click on "**Administration – Service-Code**". Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your one Service-Code! This allows you a manufacturer-independent service execution.

System-Template can be used. (Such as the IRIS code, a specified, an international standard for structured identification and documentation of fault symptoms, states and performed repairs)

To copy a System-Template, click on the “Copy” icon in the actions column. Now the Service-Code will be shown in the Settings-List. To edit the copied Service-Code, click on the “Edit” icon.

Code-Spezifikation

Name
Description

Save

Code-section

Actions	Code-section	Code-Relations	Codelevels	Ordering
	Condition	30	Code: <input type="text" value="Constantly"/>	
	Symptom	707	Area: <input type="text" value="General"/> Type: <input type="text" value="No action"/> Code: <input type="text" value="Power problem or not"/>	
	Section	123	Area: <input type="text" value="Common"/> Code: <input type="text" value="Document holder sec"/>	
	Defect	68	Area: <input type="text" value="Mechanical"/> Code: <input type="text" value="Software problem"/>	
	Repair	46	Code: <input type="text" value="Software correction /"/>	

Add Code Section

Name
Codelevels ☐ 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5

To create your own Service-Code, click on the “Add” icon next to Settings. First you need to specify your code by entering a text code and a description of your code. Now the service code is created. Enter the name of the section and select the number of code levels. Click the “Add” icon next to Add Code Section to add the code section. Any number of code sections and code levels can be created. To order the Code-Sections use the “Up” and “Down” icons in the Ordering column.

10.13 Workflow

Workflow is the actual repair process. This is running the same or similar for repairs. You can also use either one of the System-Templates and change them the way you want or create your own Workflow.

A workflow is divided into several steps. Workflows can contain loops. Each workflow must have a defined start and end state.

To define a workflow, click on the “Add” icon next to settings. Enter the Textkey (name) of the workflow and click on “Crate”.

Workflow > Create

Master data

Textkey

Create

After clicking on “Create” you automatically will be forwarded to the next step. Now you have to define the states of your Workflow. The current status corresponds to a state in the Workflow that can be achieved during the repair process. Enter a Textkey for the status and enter a Status-Key. For example, you can use a shortcut of the Textkey for the Status-Key. To add more status, click on the “Add” icon.

Workflow > 'Example' Create > Status

Workflow

Textkey Example
Statuscode Initial

Status

Textkey
Status-Key

Textkey
Status-Key

Textkey
Status-Key

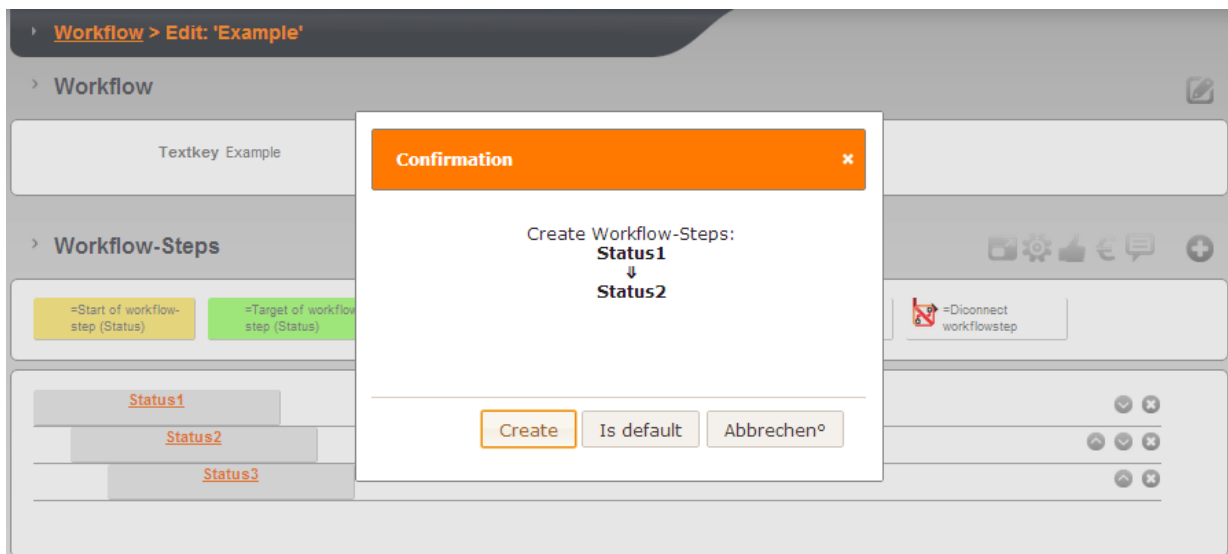
Workflow Save + Next

Now you have to edit your Workflow-Steps. Please note the instructions.

=Start of workflow-step (Status)
 =Target of workflow-step (Status)
 =Status-info (click)
 =Workflowstep
 =Connect status to workflowstep
 =Disconnect workflowstep

To create a Workflowstep click there, where the line and column of the two statuses are crossing. The status which is the start of the Workflowstep will get a yellow background and the target status will get a green background. Now you have to confirm the Workflowstep click on “Create” to create the Workflowstep, click on “Is default” to set this Workflowstep as the default step or click on “Cancel” (Default Workflowsteps will be shown blue).

Status1
 Status2
 Status3



To disconnect two statuses, click on the Workflowstep and confirm by clicking on “Delete”.

Start- and Endpoints will be set automatically.



To each state you can add so-called status-roles. These determine what information and input options are available in this status. To confirm the status-roles, click on the “status-roles” icon.



Now set a checkmark where the column of the status and the line of the status-role are crossing. To confirm click on “Save”.

> Status-Roles

	Status 1	Status 2	Status 3
Processing-View			
Incoming	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Repair actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Service flats	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outgoing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Know-How	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Track & Trace (Visitor View)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parcel shipment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loan units	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly actions can be identified. These actions will be performed when the corresponding status is reached (For example notifications in possible cases of goodwill).

> Actions

	Status1	Status2	Status3
Default			
Cost estimation: Creation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Rejected/Scrap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Back to Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company-Interface: Pass to repair	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company-Interface: Return to sender	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Close Requisitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Csv export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Csv export cost estimation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reject DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return all loan units	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Requests			
Case chargeable repair accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Repair with costs declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repair with costs accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warrantyrequest accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warrantyrequest declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Status-Conditions.

> Status-Conditions

	Status1	Status2	Status3
Position(en) müssen eingetragen sein	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case chargeable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case not chargeable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Received accessory checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shipped accessory checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test-Procedures checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Administrator]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [PIN]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Procurement]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Restricted Technician]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [ServiceUser]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Shoo]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Technician]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Warehouse]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [System]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Service-flat-charge. These costs will arise when the corresponding statues are reached.

› **Service-flat-charge**

		Status1	Status2	Status3
Additional		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reparaturkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rabatt*	24.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zusatzkosten*	37.80 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austauschkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exclusive		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reparaturkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rabatt*	24.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zusatzkosten*	37.80 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austauschkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Status reasons.

› **Workflow > Example > Edit: Buchungsgrund°**

› **Buchungsgrund°**

	Status1	Status2	Status3
Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

To add another Workflowstep click on the “Add” icon.










By clicking on each status settings like Status-Roles, Actions, Status-Conditions, Previous status, Document Template, Status-Reasons, Service-flat-charge, Customer-Email, Sms to Customer and External email can be edit.

10.14 Settings













Under "**Administration - Settings**" you can set the business unit and manufacturer. Enter the company and the business unit or the manufacturer. Each combination of business unit and manufacturer will be determined individually.

Settings: Business













Business Unit

Actions	Company	Business Unit
  	Service Communications AG	Medical
  	Service Communications AG	Medical
  	Service Communications AG	Medical

Manufacturer

Actions	Company	Manufacturer
  	Service Communications AG	Medical
  	Service Communications AG	Medical
  	Service Communications AG	Medical
  	Service Communications AG	Medical

Manufacturer-Businessunits

Actions	Statuscode	Manufacturer	Business Unit
 	Valid	Medical	Medical
 	Valid	Medical	Medical
 	Invalid	Medical	Medical
 	Invalid	Medical	Medical
 	Invalid	Medical	Medical
 	Invalid	Medical	Medical

10.15 Shop-Matrix

Here you can create a Shop-Matrix. In the Shop-Matrix you can set default Repaircenters and Servicecase Ordernumbers for each user. Select the user and click on the "submit" button. Now the Shop Matrix for that user will appear. In the first column the Manufacturer-Businessunits are listed. In the second column you can select a default Repaircenter by selecting it from the dropdown list. In the next column you can set a Servicecase order mask.

For DOA Servicecases other Repaircenters and Servicecase Ordernumbers can be set.

Shop matrix

Select entry [All]

	ALCATEL - Accessory	Blackberry - Accessory	Doro - Accessory	EMPORIA - Accessory	HTC - Accessory	LG - Accessory
0101	<input type="text" value="Gm"/> <input type="text" value="A-0101-@@@@@-T"/> (DOA) <input type="text" value="service Gm"/> <input type="text" value="A-0101-@@@@@-T"/>	<input type="text" value="Gm"/> <input type="text" value="A-0101-@@@@@-T"/> (DOA) <input type="text" value="e Gm"/> <input type="text" value="A-0101-@@@@@-T"/>	<input type="text" value="AG"/> <input type="text" value="B-0101-@@@@@-T"/> (DOA) <input type="text" value="AG, Bach"/> <input type="text" value="B-0101-@@@@@-T"/>	<input type="text" value=""/> <input type="text" value="M-0101-@@@@@-T"/> (DOA) <input type="text" value="ag, mobi"/> <input type="text" value="M-0101-@@@@@-T"/>	<input type="text" value="Gm"/> <input type="text" value="A-0101-@@@@@-T"/> (DOA) <input type="text" value="service Gm"/> <input type="text" value="A-0101-@@@@@-T"/>	<input type="text" value="ag, mobi"/> <input type="text" value="M-0101-@@@@@-T"/> (DOA) <input type="text" value="ag, mobi"/> <input type="text" value="M-0101-@@@@@-T"/>

10.16 Shop – Users

Create here for your users a Default customer. For that, click on the edit button.

Shop - Users: 'Initpro GmbH'

Index: Shop - Users

User	Default customer
ab, abc [abc, emanuel.wontorra@initpro.de]	[CustomerNumber:898] CompanyName898, LastName898, FirstName898, Email898
Doe, John [emanuel5, john.doe@initpro.de]	[CustomerNumber:899] CompanyName899, LastName899, FirstName899, Email899
Register New User Edit User Delete User	Register New User Edit User Delete User

Now every registered user will appear. Select one of the listed default customers of the drop down list.

Shop - Users > Edit: 'Initpro GmbH'

User	Default customer
ab, abc [abc, emanuel.wontorra@initpro.de]	[CustomerNumber-898] CompanyName898, LastName898 FirstName898, E
b, a [abode, emanuel.wontorra@initpro.de]	Select
cd, ab [abod, emanuel.wontorra@initpro.de]	Select
cd, ab [abod6, emanuel.wontorra@initpro.de]	Select
Doe, John [emanuel5, john.doe@initpro.de]	[CustomerNumber-899] CompanyName899, LastName899 FirstName899, E
fsdfs, adsads [ddddd, ac@initpro.de]	Select
Halbritter, Ralf [ralf, ralf12]	Select
sdagfsdgf, sdgfsdgsd [bbbbbb, ac@initpro.de]	Select
sdfsaf, adsadssad [ccccc, eadada@asad.com]	Select
Wagner3, Markus 21 [mw, markus.wagner@initpro.de]	, Wagner3 Markus 21, markus.wagner@initpro.de
Wontorra6, Emanuel [emanuel6, emanuel.wontorra@initpro.de]	Select

Save

10.17 Service Type

The service type determines which repair services are offered to the customers. Click on “**Administration – Service Type**”. And again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

To create your own Service Type, click on the “Add” icon. To complete click on “Create” or click on “Create + New” to add another Service Type.

Service Type > Create

Servicetype-Key

Textkey *

Create + New Create

10.18 Status-Reason

To create state-justifications, click on the “Add” icon next to “Index”. Now enter a text key (required), Description and Status Key.

► **Status-Reasons > Edit: 'Test'**

Textkey

Description

Status-Key










Save

10.19 Reason for Swap




If the repair is not possible for a device it is advantageous to specify the reasons for swaps. To create possible reasons, enter Swapreason-key, and a Textkey. It is possible to use the system templates. To create your own Swapreason click on the “Add” icon. Enter a Swapreason-Key and a Textkey. To confirm, click on “Create” or click on “Create + New” to create the Swapreason and add another one.

► **Index: Reasons for Swap**

System-Templates [9]

Actions	Swapreason-Key	Textkey
	G	Commercial decision
	F	Repair too expensive
	C	Repeating failure
	R	Requested by factory / Service organisation
	A	Spare part back order
	B	Spare part not coded
	P	Spare part not longer available
	E	Standard exchange
	D	Technically not repairable

► **Settings**

Actions	Company	Swapreason-Key	Textkey
  	Orange Communication AG	P	Spare part not longer available

► **Reasons for Swap > Create**

Swapreason-Key







Textkey

Create + New **Create**

10.20 Test Procedures

Index: Test Procedures

Test Procedures

Actions	Subject	Content	Attachments
  	TestProcedureTest1		
  	TestProcedureTest2	Check the parts	













Under “**Administration - Test Procedures**” Test Procedures can be described. To edit, delete or see the Informations of a Test Procedure click on the icons in the Actions column.

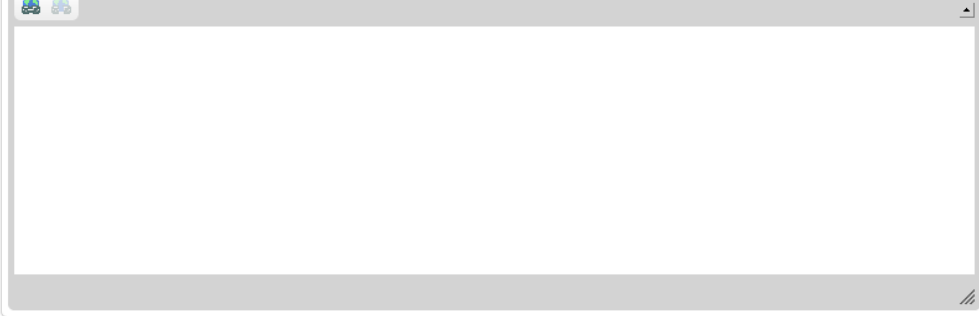
To add a Test Procedure click on the “Add” icon. Enter the Subject and type in the Test Procedure. You can add attachments (for example pictures, videos etc.).

Test Procedures > Create

Subject

Content

Quellcode **B** **I**       Stil  Format  Schriftart  G...   



Public ☒

Add Attachments

Attachments Keine ausgewählt

10.21 Texttemplate

Text templates serve to describe Accessory and Costestimation templates in several languages.

To create a Texttemplate, click on the “Add” icon under “**Administration – Texttemplate**”. Now select the type of the Texttemplate (Accessory or Costestimation template) and enter a description. To complete, click on “Create” or click on “Create + New” to create that Texttemplate and stay on this page to create another one. After clicking on “Create”, enter the meaning in different languages and enter descriptions. To complete click on “Save”.

To edit or delete a Texttemplate, click on the icons in the action column.

Texttemplate > Edit: 'Example'

Texttemplate

Type

Save

Deutsch [Beispiel]

Beispiel

English [Example]

Example

Français [Exemple]

















Exemple

Italiano [Esempio]

Esempio

Index: Texttemplate

Index

Actions	Type	Template
Accessory		
 	Accessory	Battery
 	Accessory	Charger
 	Accessory	data cable
 	Accessory	memory card
 	Accessory	Headset
 	Accessory	SIM Reader
 	Accessory	casing
 	Accessory	pen
 	Accessory	original packaged and complete
 	Accessory	warranty paper

▶ **Texttemplate > Edit: 'AO | Garantie abgelaufen'**


▶ **Texttemplate**

Type *


Save

^  **Deutsch [AO | Garantie abgelaufen]** 


Leider hat uns das vom Hersteller autorisierte Service-Center mitgeteilt, dass eine Reparatur in Garantie nicht möglich ist, da die Garantiezeit abgelaufen ist. Somit sind sämtliche Reparaturen kostenpflichtig.

^  **English [-]** 

The Service Center authorised by the manufacturer has notified us that a repair cannot be carried out under warranty as the warranty has expired. This means that all repairs are chargeable.

^  **Français [-]** 

Le Service Center agréé par le fabricant nous a malheureusement informés qu'il n'est pas possible de procéder à une réparation sous garantie car la garantie est arrivée à échéance. De fait, toutes les réparations seront facturées.

^  **Italiano [-]** 

Il Service Center autorizzato dal produttore ci ha comunicato che purtroppo non è possibile effettuare una riparazione in garanzia, poiché la garanzia risulta scaduta. Per questo motivo, tutte le eventuali riparazioni saranno a pagamento.

10.22 Product

To add your products, click on the "Add" icon in "**Administration - Product**". Enter the Articulenumber and Productname and select the Manufacturer and the Businessunit of the product. For each product you can add additional information (such as: Productdescription, Brand, Productioncode number, Dealer-Articulenumber, etc.). To use the Serial number validation, please enter Standard Warranty in Days. It is also possible to add parts to this product. Select the parts out of the parts list or click on the "Add" icon to create a new part.

Products > Create

Products

Artikelnummer 123456
 Productname Example
 Productdescription Example
 Brand Example
 Productioncode 123456
 Dealer-Artiklenumber 123456
 EAN-Code 123456
 Manufacturer- Standard-Standard*
 Businessunits
 Weight 1
 Is DOA possible ☒
 DOA-Time 10

Serial number validation settings

Template Example
 Standard Warranty in 365 Days
 Standard Warranty in 366 Days (extended)

Parts list

Search for Partnumber, Partname, EAN-Code

Part-Id	Partnumber	Partname	Partgroups	Actions
<div>Create + New</div> <div>Create</div>				

Please also note **10.21 Import / Export**

In order to find already existing products, enter your product into search line. It doesn't matter whether you enter the Brand, Productname, Artikelnummer, EAN-Code, Dealer-Artiklenumber or Productdescription.

10.23 Partgroups

Partgroups will help you to organize components and are created in "**Administration - Partgroups**". To create a Partgroup, enter the Partgroup-key and a Textkey. To confirm, click on "Create" or click on "Create + New" to create the Partgroup and add another one.

Partgroups > Create

Partgroup-key
 Textkey

Create + New
 Create

10.24 Parts

Create in "**Administration - Parts**" a data set for your parts. Enter the dates of your parts. partnumber, selling price net and basestock are mandatory fields. The parts have to be assigned to manufacturer-business units. To confirm, click on "Create" or click on "Create + New" to create the Part and add another one.

Parts > Create

Parts

Partnumber
 Partname
 Partdescription
 EAN-Code
 Identification
 Partgroups
 Selling price net CHF
 Basestock

Manufacturer-Businessunits

☒ Standard-Standard

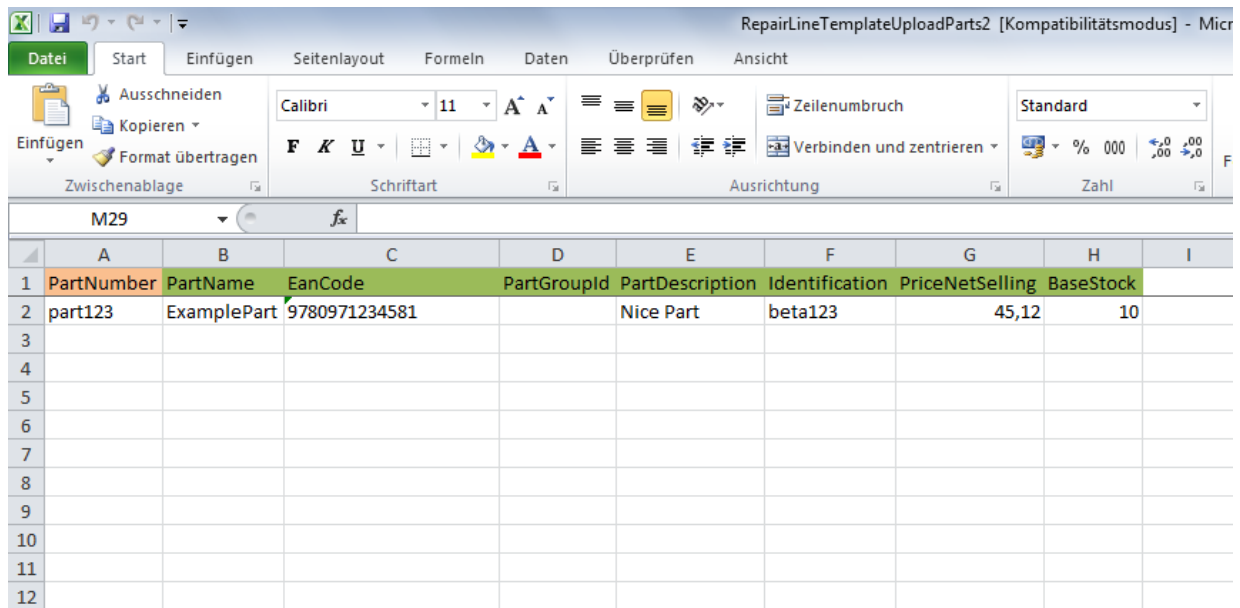
Create + New
 Create

Please also note **10.21 Import / Export**

In order to find already existing components, type in the search line, type your product. It doesn't matter whether you enter part number, part name, or UPC code.


10.25 Import/Export

To add so many products / parts is time-consuming and labor. Under "**Administration - Import / Export**" it is possible to transfer your products / parts quickly and easily from an Excel file. Download the template Excel files and enter your product / part data. Select the appropriate manufacturer-business unit and specify the file name.



	A	B	C	D	E	F	G	H	I
1	PartNumber	PartName	EanCode	PartGroupid	PartDescription	Identification	PriceNetSelling	BaseStock	
2	part123	ExamplePart	9780971234581		Nice Part	beta123	45,12	10	
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

To download the Excel-file template click on the “[Excel](#)” icon to download the products / parts Excel file click on the “[Download](#)” icon.



Import/Export > Upload products [Excel]

Excel

Manufacturer: Standard-Standard*

Businessunits

Filename: [Datei auswählen](#) Keine ausgewählt *

Submit

Already created products / parts can be downloaded as an Excel file, for example to edit changes.

10.26 Number Ranges



Under "**Administration - Number Ranges**" you have the possibility to create number ranges for Servicecase-Numbers, customernumbers, suppliernumber, delivery notes, costestimation, invoice, partorder, ticketnumber and equipment rental. Select the date of the numbers-reset and the mask.

Index: Number Ranges

Servicecase-Number

NumberReset Never
Mask @@@@
Numberflag @
Last generated number -

Manufacturer-Businessunits

Actions	Is in use	Manufacturer-Businessunits
 	yes	Standard-Standard*

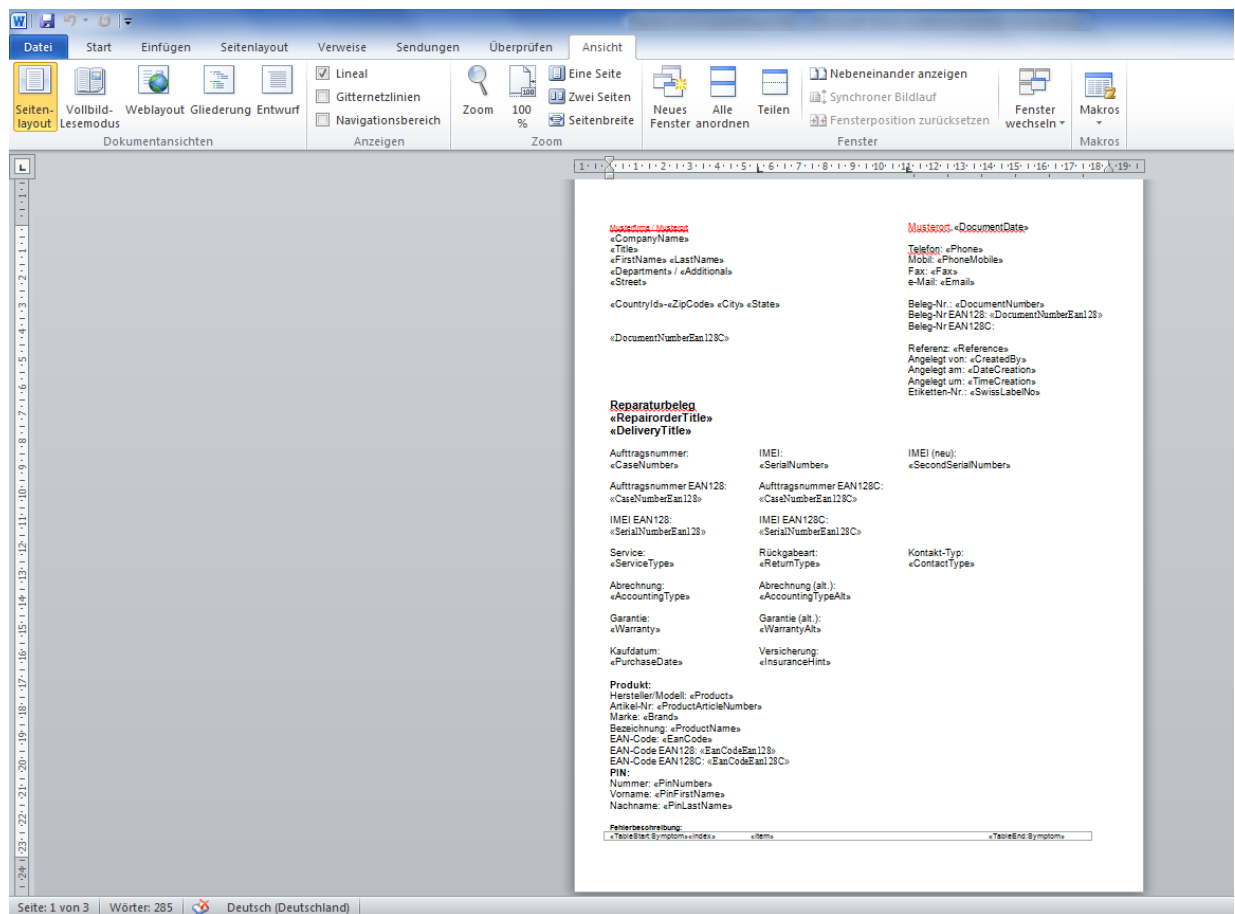
Manufacturer-Businessunits : 'Standard - Standard*'

NumberReset
Mask *
Numberflag @
Last generated number

Save

10.27 Document Template

Repairline offers under "**Administration - Document Template**" a set of document templates (such as a template for a repair slip).



To use your own created templates, click on the "Add" icon and upload your template.

Document Template > Create

Textkey: *

Documenttype: *

Translationinstruction: *

Printingqueueinstruction: *

Printinstruction: *

Addressrelation:

Filedescription:

Upload: Keine ausgewählt

11. Documents

11.1 Documents to print

Under “**Documents - Documents to print**“, all the documents that need to be printed and sent out, will appear. In the “Actions” column, you can print, delete or show the documents detailed by clicking the symbols.

11.2 Document Archive

Under “**Documents - Document Archive**” you can search every document by using the filters.

11 Stock

11.1 Incoming Goods

Repairline features a comfortable warehouse management. Under “**Stock**” you can manage your whole warehouse management.

Incoming goods are entered in “**Stock – Incoming Goods**”. At first enter the Supplier ID (If you have not create them please do that first at “**Procurement – Supplier**”). Every part in the stock must obtain an assigned stock ground (Please enter your stock grounds at “**Stock – Stock Ground**”). Define therefore, on which stock ground the parts are to be stored. Enter the delivery date. You can also enter the delivery number and reference.

Now enter the name of the part and the amount of delivery. By clicking the “delete” icon in the “Actions” column, you can delete unwanted lines. Beyond these three components is required for each additional component a new line. To add a line, click on the “Add” icon. To complete, click “Create“, or click on “Create + New” to enter another income.

Incoming Goods: Manual Entry

Supplier

Supplier-Id [00001] Example *

Suppliernumber 00001

Companyname Example

Firstname

Lastname

Email

Street

Zip-Code

City

State

Country

Delivery Note

Stock Ground Lager-Nummer | Lagerort-Num *

Deliverydate 10/01/2012 *

Deliverynote number 123

Deliverynote date 01/01/2012

Reference

Parts

Actions	Parts	Quantity
✕	123 - Example [132]	

Create + Next

Create

12.2 Fast Entry

Here you have the opinion to entry your incoming goods very easy and fast. Under “**Stock – Fast Entry**” you will find all the Open Part Orders (see on 12.4) that have been created. (To create a part order, click on “**My Account - Personal Requisition Notes**”) or created them while entering a Servicecase)

Incoming Goods: Fast Entry => Partorders

Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
⊕ ⓘ	26/02/2011	OrderNumber4	Reference4	Delivered partly	1	


Click on the “Info” icon in the “Actions” column to look on informations like Supplier, Partorders and Orderpositions.

Click on the “Select” icon to entry the incoming goods. Now the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that check the Quantity if the Order-Quantity doesn't match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check.

Incoming Goods: Fast Entry

Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	28/02/2011	OrderNumber4	Reference4	Delivered partly	1	

Stock Ground

Stock Ground *
 Deliverydate *
 Deliverynote number
 Deliverynote date
 Reference

Orderpositions *

Parts	Price net	Unit	Quantity	Quantity delivered	Ausgangsprüfung*
PartDescription 4	13.00	Unit	13	<input type="text" value="13"/>	<input type="checkbox"/>

Save

12.3 Allocate Incoming Goods

Here you control the transfer of the incoming goods into the Stock Grounds. To allocate your goods select your Stock Ground and the Bookingdate. Now all Parts of this Stock Ground will appear. Select the desired Part by clicking on the “Select” icon. The other Stock Ground will appear now. Enter the Quantity in the line of the desired Stock Ground. To complete click on “Save”.

Incoming Goods: Allocate Incoming Goods

Stock Ground

Stock Ground *
 Bookingdate *

Parts

Selection	Parts	Total
	MwTest - ExamplePart [9780971234581]	30
	MwTest97 - ExamplePart [9780971234581]	2
	PartNo1 - PartNo1 [ean17]	1
	PartNumber 1000 - PartName 1000 [EanCode 1000]	14
	partTest1 - ExamplePart [9780971234581]	10
	partTest2 - ExamplePart [9780971234581]	3

Stock Ground

Stock Ground	Total	Reservation	Available	Quantity
Lager15 Lagerort1 Lagerplatz Motorhead	30	0	30	<input type="text"/>
Stock-Test Test-Stock Test	0	0	0	<input type="text"/>
Sum				

Save

12.4 Open Part Orders

Under "**Stock - Open Part Orders**" you find all of your part orders that have been created.





Incoming Goods: Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	27/02/2011 01:00	OrderNumber5	Reference5	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg
	28/02/2011 01:00	OrderNumber6	Reference6	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg
	09/03/2011 01:00	OrderNumber15	Reference15	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg

Click on the "Info" icon in the "Actions" column to look on Informations like Supplier, Partorders and Orderpositions. You can print or cancel the order by clicking on the icons on the top right.

Incoming Goods: Fast Entry

Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
 	28/02/2011	OrderNumber6	Reference6	Ordered	1	mva, Gumeplz. 27, 93049, Regensburg
 	09/03/2011	OrderNumber15	Reference15	Ordered	1	mva, Gumeplz. 27, 93049, Regensburg

Stock Ground

Stock Ground *
 Deliverydate *
 Deliverynote number
 Deliverynote date
 Reference

Orderpositions *

Parts	Price net	Unit	Quantity	Quantity delivered	Ausgangsprüfung*
PartDescription 6	15.00	Unit	15	<input type="text" value="15"/>	<input type="checkbox"/>

By clicking on the “Edit” icon the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that please check the Quantity if the Order-Quantity doesn’t match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check. To complete click on “Save”. Now the Order is finish it will be delete automatically form your Open Parts Order List.

12.5 Delivery Note

Here you'll find the list of all of your delivery notes. Use the many filters, such as Partgroups, Deliverynote number, manufacturer-business units, Bookingdate from, etc., so that your search specifically to the desired result.

Incoming Goods: Delivery Note

Filter

Deliverynote number

Parts

Partgroups MyBaugruppe^o

Manufacturer-

Businessunits

Bookingdate from 10/12/2012

Bookingdate to 30/12/2012

Supplier

Reference

Delivery Note

Deliverydate	Bookingdate	Supplier	Deliverynote number	Reference
21/12/2012	21/12/2012 01:08	[S01] MyBaugruppe, MyBaugruppe		OrderNumber2
• Lager15 Wareneingang Wareneingang - PartNumber 2 - PartName 2 [EanCode 2] = 11				

12.6 Manual Entry

Make here the transfer of Parts between your Stock Ground. Select the Stock Grounds, which will take place between the transfers and enter the posting date.

Create: Stock => Manual Entry

Stock Ground

Stock Ground Select item

- ↓

Stock Ground Select item

Bookingdate 01/01/2012

Stock Level

No stock level available

Save

12.7 Stock Requisition

In "**Stock - Stock Requisition**" parts can manually be taken (without a regard to a Servicecase). Specify the user, the part and the booking date. Now appear all storage bins (with stock) having the specified component. Now enter each amount that you take to the line of the Stock Ground. To complete, click on "Create" or click on "Create + Next" to perform more Stock Requisition.

Create: Stock => Stock Requisition

Fields

User

Parts

Bookingdate

Is revision-booking

Stock Ground

Stock Ground	Stock Level	Reservation	Available	Quantity
Lager15 Lagerort1	40	13	27	
Lager15 Lagerort1 Test1	100	0	100	
Lager15 Wareneingang Wareneingang	2	2	0	
Sum				0

Create + Next

Create

12.8 Stock Posting

Under "**Stock - Stock Posting**" you can manually add Parts to your Stock Grounds. Specify the User, the Part and the Booking Date. Now all Stock Grounds that can store the specified Part will appear. Now enter each amount that you add to the Stock Grounds. To complete, click on "Create" or click on "Create + Next" to add more Parts to your Stock Grounds.

Create: Stock => Stock Posting

Fields

User

Parts

Bookingdate

Is revision-booking

Stock Ground

Stock Ground	Stock Level	Reservation	Available	Quantity
Lager15 Lagerort1 Lagerplatz Zappa	0	0	0	
Lager15 Lagerort1 Test1	0	0	0	
Sum				0

Create + Next

Create

12.9 Stock Level

Under "**Stock – Stock Level**" you can obtain an overview of the Quantity in your Stocks.

To determine your Stock Levels, use the filters. You can use the filters: Parts, Partgroup, Manufacturer-BusinessUnits, Stock, Stock Location and Stock Ground singly or all at once. Now the Parts and the Parts Informations (like Part-Id, Basestock, EAN-Code etc.) will appear. By clicking on “Stock Ground” ever Stock that has that Part will appear. This will show you the exact storage location, the Stock Level, how many Parts are reserved and how many Parts are available. To request a requisition for one Part, click on the “Request” icon in the “Actions” column. Now enter quantity and required delivery date and click on “Create”. To create a common request you have to click on the “**Request**” icon on the top right.

Stock: Stock Level

Filter

Parts
 Partgroups
 Manufacturer-Businessunits
 Stock
 Stock Location
 Stock Ground

Stock Allocation

Actions	Part-Id	Partnumber	Partname	EAN-Code	Partdescription	Stock Level	Reservation	Basestock	Available																
	3051	MwTest97	ExamplePart	9780971234581	Nice Part	142	15	10	117																
<div> <div>Stock Ground</div> <table border="1"> <thead> <tr> <th>Stock</th> <th>Stock Level</th> <th>Reservation</th> <th>Available</th> </tr> </thead> <tbody> <tr> <td>Lager15 Lagerort1 Lagerplatz Motormess</td> <td>40</td> <td>13</td> <td>27</td> </tr> <tr> <td>Lager15 Lagerort1 Test1</td> <td>100</td> <td>0</td> <td>100</td> </tr> <tr> <td>Lager15 Warenlagerang Warenlagerang</td> <td>2</td> <td>2</td> <td>0</td> </tr> </tbody> </table> </div>										Stock	Stock Level	Reservation	Available	Lager15 Lagerort1 Lagerplatz Motormess	40	13	27	Lager15 Lagerort1 Test1	100	0	100	Lager15 Warenlagerang Warenlagerang	2	2	0
Stock	Stock Level	Reservation	Available																						
Lager15 Lagerort1 Lagerplatz Motormess	40	13	27																						
Lager15 Lagerort1 Test1	100	0	100																						
Lager15 Warenlagerang Warenlagerang	2	2	0																						
	3038	partTest1	ExamplePart	9780971234581	Nice Part	25	0	10	15																
<div> <div>Stock Ground</div> </div>																									
	3039	partTest2	ExamplePart	9780971234581	Nice Part	3	0	10	-7																
<div> <div>Stock Ground</div> </div>																									

Personal Requisition Notes > Create: Requisition Notes

Requisition Notes

User
 Parts
 Available 0
 Quantity
 Requested Deliverydate

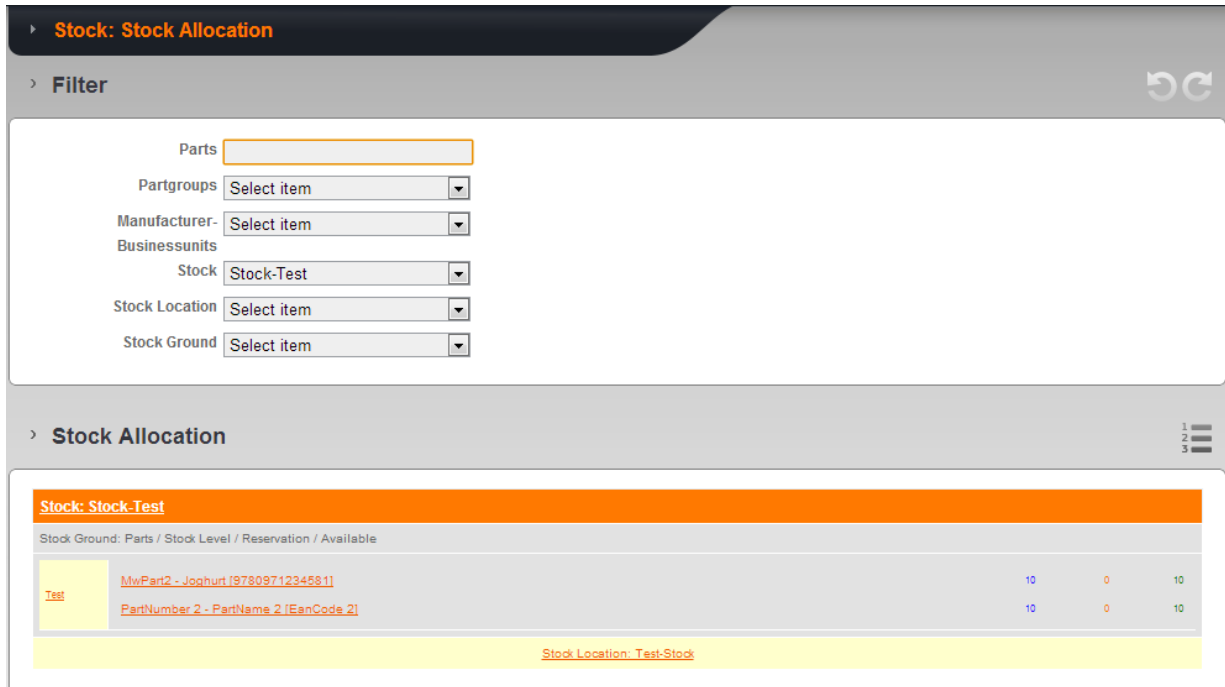
Create

12.10 Stock Allocation

Under “**Stock – Stock Level**” you can obtain an overview of your Stock Ground and the specific Parts of inventory.

Use the many filters, such as Parts, Partgroups, Manufacturer-Businessunits, Stock, Stock Location and Stock Ground so that your search shows you quickly the desired result.

To create a Request you have to click on the “**Request**” icon on the top right.



The screenshot shows the 'Stock: Stock Allocation' interface. It features a 'Filter' section with the following fields:

- Parts:
- Partgroups:
- Manufacturer-Businessunits:
- Stock:
- Stock Location:
- Stock Ground:

Below the filters is the 'Stock Allocation' section. It displays a table for 'Stock: Stock-Test' with the following data:

Stock Ground: Parts / Stock Level / Reservation / Available				
Test	MwPart2 - Joghurt [9780971234581]	10	0	10
	PartNumber 2 - PartName 2 [EanCode 2]	10	0	10

At the bottom of the table, it indicates 'Stock Location: Test-Stock'.

12.11 Stock Ground














Here you can specify the settings for the name of your Stock and their order.

To rename a Stock (or Stock Location, Stock Ground) click on the “Edit” icon in the “Actions” column and enter the new name of the Stock. To delete a Stock (or Stock Location, Stock Ground), click on the “Delete” icon in the “Actions” column. To learn the details of a Stock (or Stock Location, Stock Ground), click on the “Details” icon in the “Actions” column.

























By clicking on the “Up” and “Down” icons in the “Ordering” column, you can sort your Stocks / Stock Locations / Stock Grounds as you like.

Index: Warehouse-Settings




Stock

Actions	Stock	Ordering
  	Lager Kleinteile1	
  	Lager15	 
  	Stock-Test	

Stock Location

Actions	Stock Location	Ordering
Lager Kleinteile1		
  	Lagerort_Test	
Lager15		
  	Warenausgang	
  	Lagerort1	 
  	Lagerort2_2	 
  	Wareneingang	
Stock-Test		
  	Test-Stock	

Stock Ground

Actions	Stock Ground	Stock Ground Type	Ordering
Lager15 Warenausgang			
  	Warenausgang	Outcoming goods	

To create a Stock, click on the "Add" icon and enter the name of the Stock (you have the possibility to type in a description of that Stock). To complete, click on "Create" or click on "Create + New" to add another Stock.

Warehouse-Settings > Create: Stock

Stock-No

Description

Create + New

Create

To create a Stock Location, click on the "Add" icon and enter the name of the Stock Location (you have the possibility to type in a description of that Stock Location) and assign a Stock to that Stock Location. To complete, click on "Create" or click on "Create + New" to add another Stock Location.

Warehouse-Settings > Create: Stock Location

Stocklocation-No *

Description

Stock *

Create + New Create

To create a Stock Ground, click on the "Add" icon and enter the name of the Stock Ground (you have the possibility to type in a description of that Stock Ground) and assign a Stock and a Stock Location to that Stock Ground. To complete, click on "Create" or click on "Create + New" to add another Stock Ground.

Warehouse-Settings > Create: Stock Ground

Stockground-No *

Description

Stock Location *

Stock Ground Type *

Create + New Create

Each Stock Ground must be assigned to a Stock Location and each Stock Location must be assigned to a Stock!

















13 Procurement

13.1 Intending Orders

Under "**Intending Orders**" you will see all the Part Orders that has to be finished. To delete an Intending Order, click on the "Delete" icon in the "Actions" column. Click on the "Edit" icon in the "Actions" column to learn the details of the planned order.

Index: Intending Orders

Intending Orders

Actions	created	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	22/02/2011 10:33	OrderNumber10	Reference10	To Order	1	...
	22/02/2011 10:33	OrderNumber10	Reference10	To Order	1	...
	22/02/2011 10:33	OrderNumber11	Reference11	To Order	1	...
	22/02/2011 10:33	OrderNumber12	Reference12	To Order	1	...
	22/02/2011 10:33	OrderNumber13	Reference13	To Order	1	...
	22/02/2011 10:33	OrderNumber14	Reference14	To Order	1	...
	15/03/2011 16:34	[inpr5-00001]		To Order	0	...
	05/04/2011 17:16	tmp		To Order	1	...
	05/04/2011 17:55	tmp		To Order	1	...
	05/04/2011 18:29	[inpr5-00002]		To Order	1	...
	22/02/2011 10:33	OrderNumber8	Reference8 pp	To Order	1	...
	08/06/2011 14:17	[inpr5-00004]		To Order	1	...
	20/06/2011 14:43	[inpr5-00010]	test2006	To Order	1	...
	20/06/2011 14:48	[inpr5-00011]	test2006_01	To Order	1	...
	21/06/2011 09:01	[inpr5-00012]		To Order	1	...
	21/12/2012 02:21	[inpr5-00013]		To Order	1	...

Create a Part Order by check the Supplier/Partorders/Orderpositons. To edit the Supplier, click on the “Edit” icon. Enter your Partorders and Orderpositons. (to add another Orderposition click on the “Add” icon. To complete click on “Generate Partorder” or click on “Save” to save the changes.

Intending Orders > Edit: 'OrderNumber7'

Supplier

Suppliernumber S01
Reference
Companyname
Title
Firstname
Lastname
Email
Phone 12313213
Phone mobile
Fax

Department
Street
Additional
Zip-Code
City
State Bayern
Country GERMANY

Partorders

Orderdate 3/1/2011
Deliverydate 3/4/2011
Reference Reference7
Orderstatus To Order

Terms of delivery TermsOfDelivery
Terms of payment TermsOfPayment
Orderinstructions

Orderpositions

Actions	Parts	Price net	Unit	Quantity	Deliverydate
	MwTest97 - ExamplePart			10	

Generate partorder
Save

13.2 Order Proposals

Under „Procurement – Order Proposals“, you can create Purchase Orders dependent on Requisition Notes.

The Order Proposals are grouped into Preferred Supplier, Low Priced Supplier and Missing Supplier. To generate a Partorder, set a checkmark in the "Actions" column to each Part for which a Partorder is to be made and enter the requesting amount. To complete, click on "Generate Partorder".

Index: Order Proposals

[Preferred supplier](#)
[Low priced supplier](#)
[Missing supplier](#)

Actions	Parts	Requested Deliverydate	Supplier	Available	Ordered	Booked	Reserved	Requesting
<input type="checkbox"/>	MwTest97 - ExamplePart [9780971234581]		[S011] Wagner Enterprise, Wagner	27	30	0	11	<input type="text" value="0"/>
<input type="checkbox"/>	MwTest97 - ExamplePart [9780971234581]	21/12/2012 01:00	[S011] Wagner Enterprise, Wagner	27	20	0	0	<input type="text" value="0"/>
<input type="checkbox"/>	PartNo1 - PartNo1 [ean17]		[S011] Wagner Enterprise, Wagner	1	27	0	0	<input type="text" value="0"/>
<input type="checkbox"/>	PartNumber 1 - PartName 1 [EanCode 1]		[S011] Wagner Enterprise, Wagner	0	30	0	0	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	PartNumber 1 - PartName 1 [EanCode 1]	24/02/2011 15:03	[S011] Wagner Enterprise, Wagner	0	10	0	0	<input type="text" value="10"/>

Generate partorder

To see all the Parts with missing suppliers click on “[Missing Supplier](#)”. Type in the name of the supplier and set a checkmark to that Parts to which want to add a supplier. To complete click on “[Save](#)”

Index: Order Proposals

[Preferred supplier](#)
[Low priced supplier](#)
[Missing supplier](#)

Supplier

Supplier

Actions	Parts	Available	Ordered	Booked	Reserved	Quantity
<input checked="" type="checkbox"/>	MwTest4 - ExamplePart [9780971234581]	0	0	0	0	0
<input checked="" type="checkbox"/>	MwTest8 - ExamplePart [9780971234581]	0	98	0	0	0
<input type="checkbox"/>	MwTest9 - ExamplePart [9780971234581]	0	0	0	0	0
<input type="checkbox"/>	PartNumber 10 - PartName 10 [EanCode 10]	0	99	0	0	0
<input type="checkbox"/>	PartNumber 100 - PartName 100 [EanCode 100]	0	0	0	0	0
<input type="checkbox"/>	PartNumber 1000 - PartName 1000 [EanCode 1000]	5	0	0	0	0
<input type="checkbox"/>	partTest1 - ExamplePart [9780971234581]	10	10	0	0	0
<input type="checkbox"/>	partTest1 - ExamplePart [9780971234581]	10	5	0	0	0
<input type="checkbox"/>	partTest6 - ExamplePart [9780971234581]	0	0	0	0	0

Save



















13.3 Open Requisition Notes

Here you have the opportunity to see all open requisitions.

The Open Requisition Notes are grouped into Servicecaserelated and Common Requisitions. Click on the “[Information](#)” icon, to get the details of the requisition.

Index: Open Requisition Notes

Servicecaserelated [18]

Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	Doe, John [emanuel5.john.doe@initpro.de]	partTest6 - ExamplePart (9780971234561)	1	case-00062	23/08/2012 10:14		0	0	0	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	1	case-00066	11/08/2012 09:39		0	0	1	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	1	case-00080	23/04/2012 11:07		0	0	1	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	1	case-00077	23/04/2012 10:13		0	0	1	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	2	ABC123	12/04/2012 14:11		0	0	1	0	2
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	8	ABC123	12/04/2012 13:43		0	0	1	0	8
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	10	ABC123	12/04/2012 13:41		0	0	1	0	10
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	1	ABC123	12/04/2012 13:23		0	0	1	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	MwTest4 - ExamplePart (9780971234561)	3	case-00062	20/08/2011 10:40		0	0	0	0	3
	Doe, John [emanuel5.john.doe@initpro.de]	partTest1 - ExamplePart (9780971234561)	2	case-00062	20/08/2011 10:39		0	0	10	0	2
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	12	case-00062	17/06/2011 09:49		0	0	1	0	12
	Doe, John [emanuel5.john.doe@initpro.de]	partTest1 - ExamplePart (9780971234561)	1	case-00013	15/08/2011 15:51		0	0	10	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	MwTest6 - ExamplePart (9780971234561)	2	case-00036	24/05/2011 16:52		0	0	0	0	2
	Doe, John [emanuel5.john.doe@initpro.de]	partTest6 - ExamplePart (9780971234561)	1	case-00036	24/05/2011 16:51		0	0	0	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNumber 1 - PartName 1 (EanCode 1)	1	case-00022	29/04/2011 16:10		0	0	0	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	PartNumber 100 - PartName 100 (EanCode 100)	2	ABC123	14/04/2011 18:37		0	0	0	0	2
	Doe, John [emanuel5.john.doe@initpro.de]	PartNumber 10 - PartName 10 (EanCode 10)	2	ABC123	15/03/2011 14:09		0	0	0	0	2
	Doe, John [emanuel5.john.doe@initpro.de]	PartNo1 - PartNo1 (658117)	1	ABC123	04/03/2011 10:19		0	0	1	0	1

Common [11]











Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	Doe, John [emanuel5.john.doe@initpro.de]	partTest11 - ExamplePart (9780971234561)	10	no	28/12/2012 01:07	28/12/2012	0	0	10	0	10
	Doe, John [emanuel5.john.doe@initpro.de]	MwTest97 - ExamplePart (9780971234561)	12	no	21/12/2012 02:25	21/12/2012	0	0	27	10	12
	Doe, John [emanuel5.john.doe@initpro.de]	MwTest9 - ExamplePart (9780971234561)	10	no	21/12/2012 02:23		0	0	0	0	10
	Doe, John [emanuel5.john.doe@initpro.de]	MwTest97 - ExamplePart (9780971234561)	1,000	no	21/12/2012 02:20	21/12/2012	0	0	27	10	1,000
	Wagner3, Marius 21 [m.wagner@initpro.de]	MwTest97 - ExamplePart (9780971234561)	1	no	08/06/2011 10:11		0	0	27	10	1
	Wagner3, Marius 21 [m.wagner@initpro.de]	partTest6 - ExamplePart (9780971234561)	1	no	08/06/2011 09:59		0	0	0	0	1
	Doe, John [emanuel5.john.doe@initpro.de]	partTest6 - ExamplePart (9780971234561)	1	no	08/06/2011 09:58		0	0	0	0	1

13.4 Requisition Notes

Under "Procurement - Requisition Notes" you will find all of the Requisition Notes. Again you have the option to create a new requisition. Just click on the "Requesting" icon. To learn more about the requisition, click on the "Information" icon in the "Actions" column.

Index: Requisition Notes

Requisition Notes

Actions	Requisition-d	User	Parts	Quantity	Requested Deliverydate
	50	Requisition Notes [1] (see: requisition notes)	PartNumber 1 - PartName 1 [EanCode 1]	5	
	52	Requisition Notes [1] (see: requisition notes)	PartNumber 1 - PartName 1 [EanCode 1]	1	24/02/2011
	54	Requisition Notes [1] (see: requisition notes)	PartNo1 - PartNo1 [Ean17]	1	
	55	Requisition Notes [1] (see: requisition notes)	PartNumber 1000 - PartName 1000 [EanCode 1000]	10	09/03/2011
	56	Requisition Notes [1] (see: requisition notes)	PartNumber 1 - PartName 1 [EanCode 1]	1	
	57	Requisition Notes [1] (see: requisition notes)	PartNumber 10 - PartName 10 [EanCode 10]	2	
	59	Requisition Notes [1] (see: requisition notes)	PartNumber 100 - PartName 100 [EanCode 100]	2	
	65	Requisition Notes [1] (see: requisition notes)	PartNumber 1 - PartName 1 [EanCode 1]	1	
	79	Requisition Notes [1] (see: requisition notes)	partTest6 - ExamplePart [9780971234581]	1	
	80	Requisition Notes [1] (see: requisition notes)	MwTest8 - ExamplePart [9780971234581]	2	

1 2 3

13.5 Part Order Book

Here you will see a list of your Part Orders.

Use the filters under "**Purchasing - Part Order Book**" in order to find the desired Part order. Click on the "Information" icon in the "Actions" column to get the details of the order.

Index: Part Order Book

Filter

Orderdate from



Orderdate to

Ordernumber

Supplier

Orderstatus

Partorders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	21/12/2012	[inpr5-00013]		To Order	1	Requisition Notes [1] (see: requisition notes)
	28/12/2012	[inpr5-00014]		To Order	1	Requisition Notes [1] (see: requisition notes)

13.6 Supplier

Here is the data set of your Suppliers.

Already registered suppliers can be searched under "**Purchasing - Supplier**". The search is performed by entering the company name (search also accepts Lastname, Firstname, Suppliernumber, Email, Street, Zip-Code, City) or by using the alphabetical index. The search

is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @ sign, all registered suppliers are listed.






















Index: '@'

Search for

Lastname, Firstname, Suppliernumber, Email, Companyname, Street, Zip-Code, City

@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

> Supplier

Actions	Suppliernumber	Companyname	Lastname	Firstname	Title	Address
  	S01	Example	Example			Example
  	S02	Example	Example			Example
  	ttttt	Example	tst	tst		Example
  	inpr-00003	Example	rew	rew		Example
  	inpr5-00007	Example				Example
  	inpr5-00008	Example				Example
  	inpr5-00009	Example				Example

To add a new Supplier, click on the “add” icon. Now enter the Informations of the supplier and click on “Create”.

> Supplier > Create: Supplier

> Supplier

Reference

Companyname *

Title

Firstname

Lastname

Email

Phone mobile *

> Address

Companyname

Salutation ☐ Miss ☐ Mister

Title

Firstname

Lastname

Email

Phone

Phone mobile *

Fax

Department

Street *

Additional

Zip-Code *

City *

State

Country *

Create

To delete a Supplier, click on the “Delete” icon in the “Actions” column. To learn the details of a Supplier, click on the “Details” icon in the “Actions” column. To edit a Supplier, click on the “Edit” icon in the “Actions” column. By clicking on the “Edit” icon you can edit the Master

record and Invoice of the Supplier and add Contact or Delivery Information (for that click on the “Add” icon).

Supplier > Edit: 'inpr3-00001'

Master record

Reference
Email
Companyname Example
Phone mobile 0123456789
Title
Firstname
Lastname

Save

Contact

Delivery

Invoice

Companyname Example
Salutation
Title
Firstname
Lastname
Email
Phone
Phone mobile 0123456789
Fax

Department
Street Example 1
Additional
Zip-Code 1234
City Example
State
Country GERMANY